



The Chamber

For a Greater Chapel Hill-Carrboro

15th Annual State of the Community Report 2022 Databook

Data Partners



2022 Community Champions



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

A Note about the 2022 State of the Community Data Book

September 1, 2022

Dear Reader,

The 2022 State of the Community Data Book was produced against the backdrop of a two-year COVID-19 pandemic, subsequent community and economic recovery, and the likely beginning of a national economic recession. Orange County's formal state of emergency expired on May 8, 2022 after 780 days in effect, and the information included in this DataBook will serve as a reference to the condition of our community leading up to and during the pandemic, as well as how our community has fared through June 2022.

This DataBook includes the most up-to-date information available (though in some cases that may be 2019, 2020, or 2021). When possible, we have added available 2022 data to illustrate the current economic and community conditions. COVID-19, and the subsequent recovery, created statistical outliers that will affect the current and future reliability of year-over-year comparisons, and the data must be considered within the context of this unprecedented period in our history.

The state of the Greater Chapel Hill-Carrboro community is strong, and its people and institutions remain resilient through the crisis. We hope you enjoy the 2022 State of the Community Data Book.

Sincerely,

Aaron Nelson
President and CEO
The Chamber for a Greater Chapel Hill-Carrboro

Special thank you to Carolina Demography for sourcing much of the data, to data partners Orange County, Town of Carrboro, Town of Chapel Hill, Town of Hillsborough, and the Chamber's Partnership for a Sustainable Community for collaboratively funding the project, and to Jensen Anderson, MSW for her work organizing and translating the data into the beautiful graphs and charts of this report.

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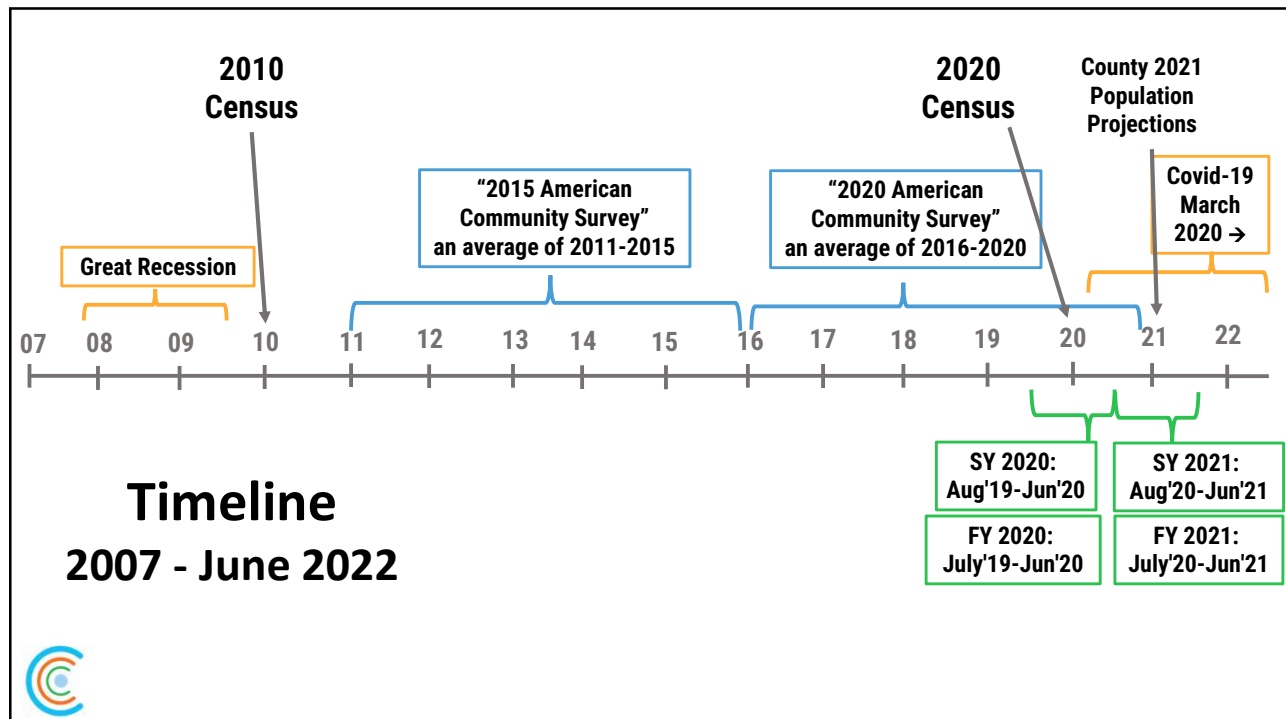
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2022 Context

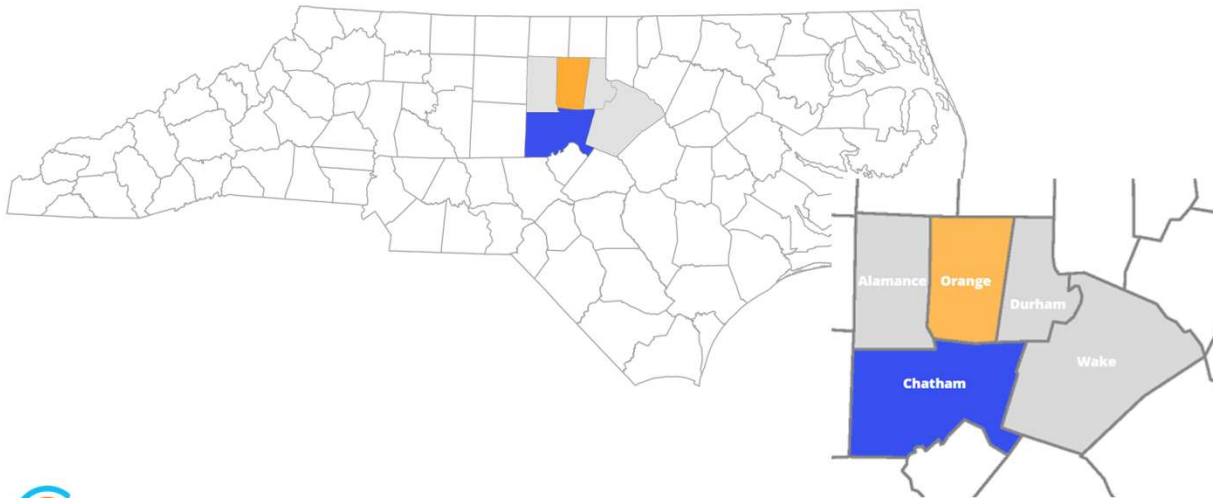


1



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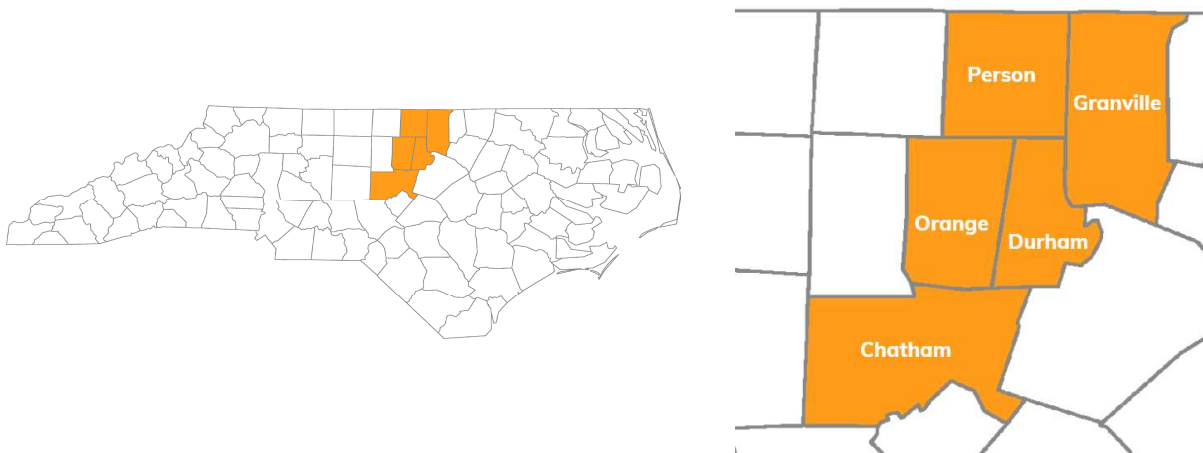
Orange County + Chatham County + Neighbors



Source: Jensen Anderson, MSW

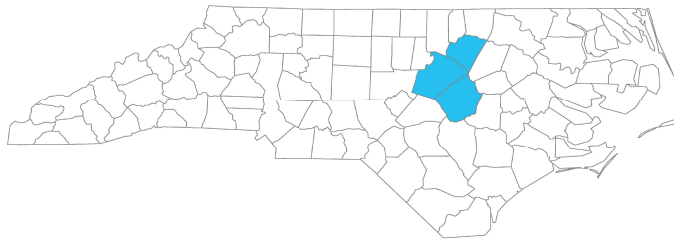
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Durham-Chapel Hill Metropolitan Statistical Area (MSA)



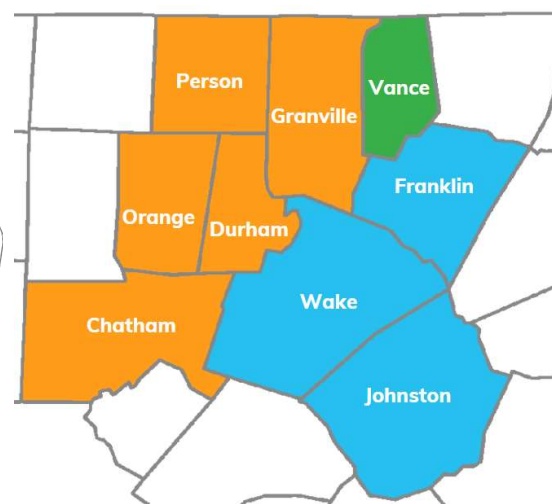
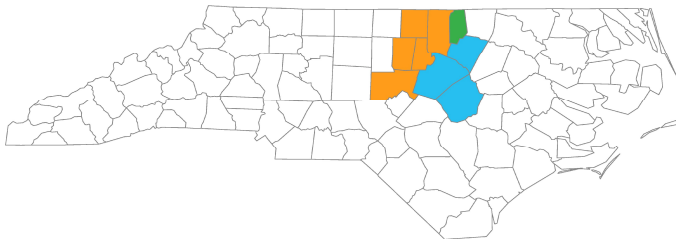
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Raleigh-Cary Metropolitan Statistical Area (MSA)



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Raleigh-Durham-Cary Combined Statistical Area (CSA)



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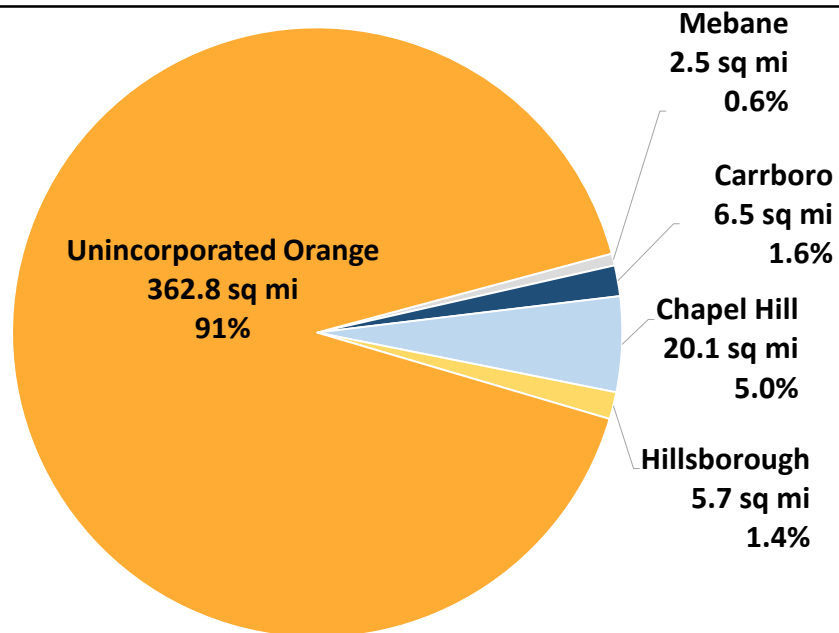
County and Municipal Uses and Land Value



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2020 Orange County Land Distribution

Total: 398 square miles

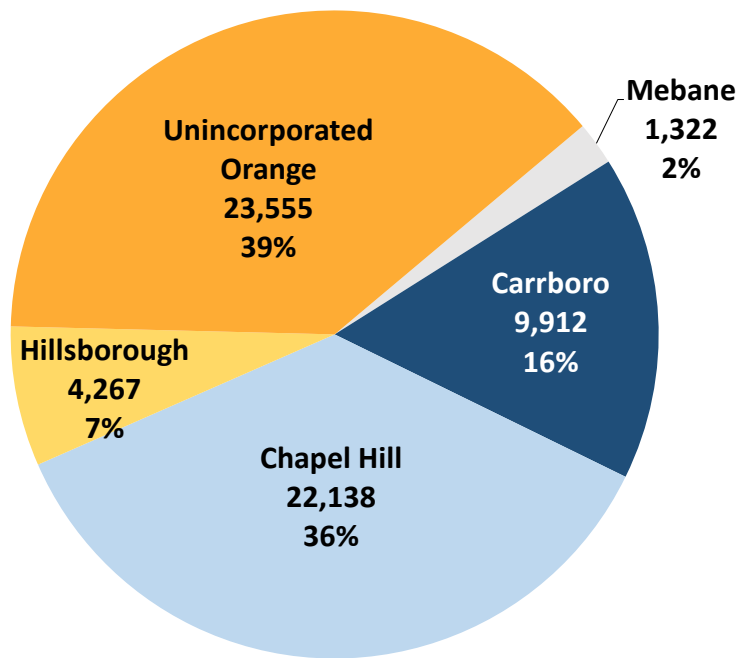


Source: 2020 Census

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2020 Orange County Housing Distribution

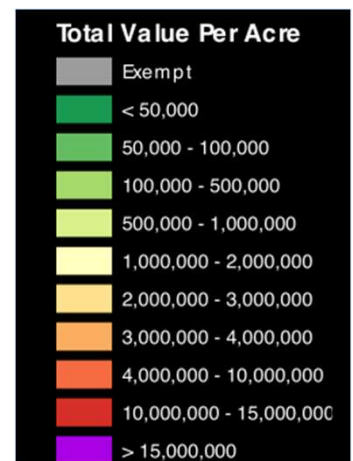
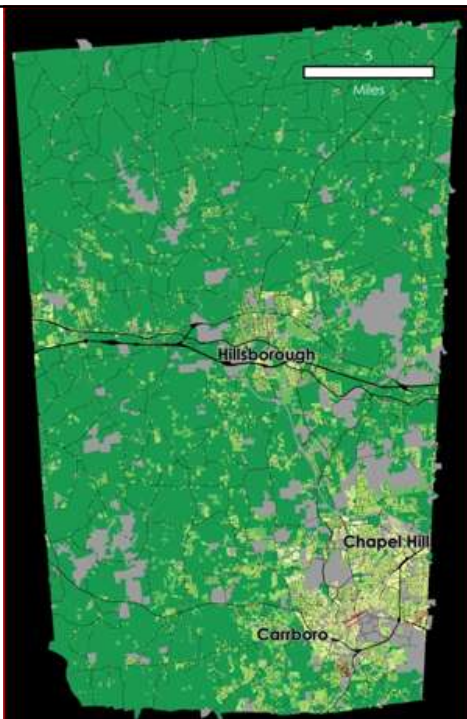
61,211 total housing units



Source: 2020 Census

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Orange County Total Value Per Acre



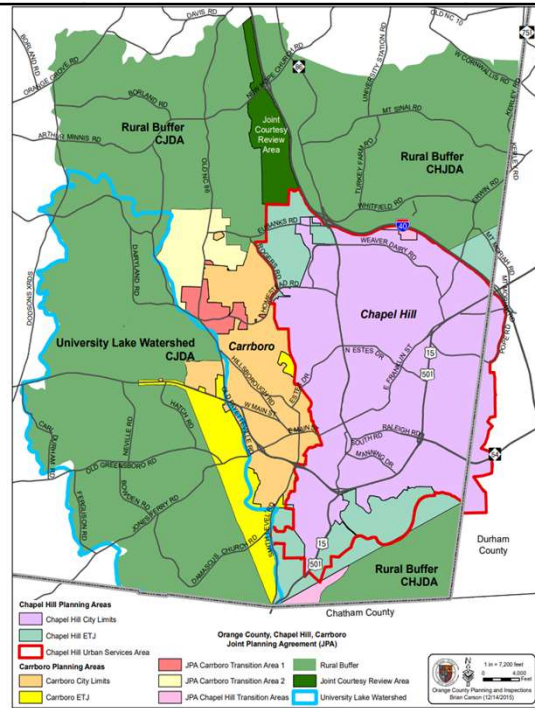
Source: Urban 3

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Orange County- Chapel Hill- Carrboro Joint Planning Area and Rural Buffer



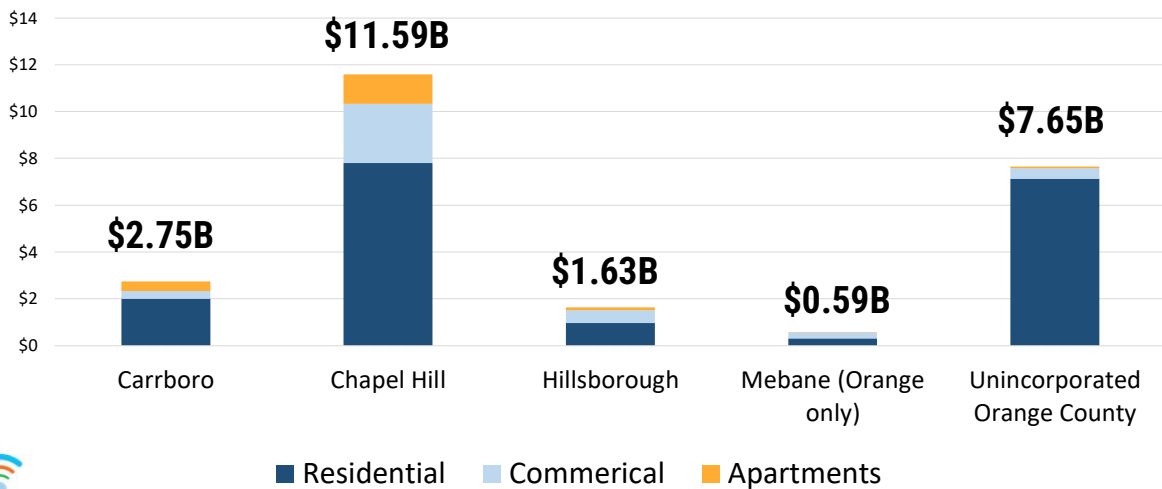
Source: Orange County, 2015



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Local Commercial, Apartment, and Residential Assessed Values Vary Across Jurisdictions

2022 total assessed values for areas of Orange County (in billions)

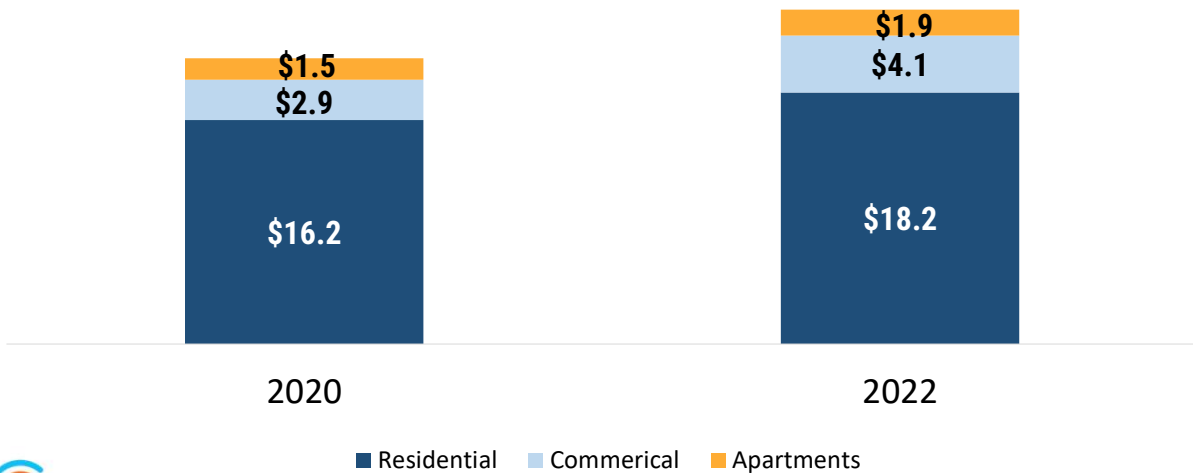


Source: Orange County Tax Assessor

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Orange County Residential Value Increases by \$2B, Commercial by \$1.2B from 2020 to 2022

Orange County (all) uses and assessed value (in billions)

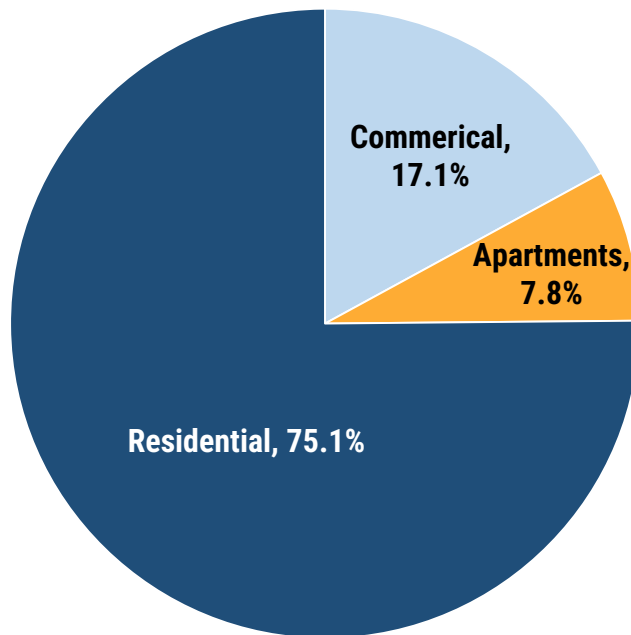


Orange County 2022 Total: \$24.2 Billion

Source: Orange County Tax Assessor

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2022 Orange County Assessed Value by Uses



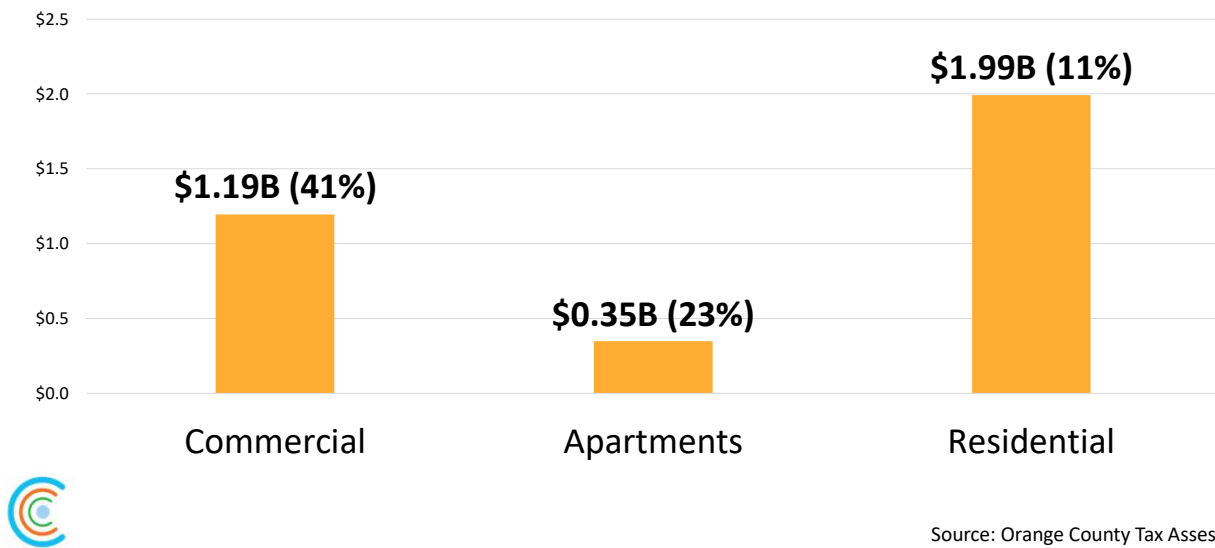
Orange County 2022 Total: \$24.2 Billion

Source: Orange County Tax Assessor

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Orange County Residential Growth in Assessed Value from 2020 to 2022 Outpaces Commercial

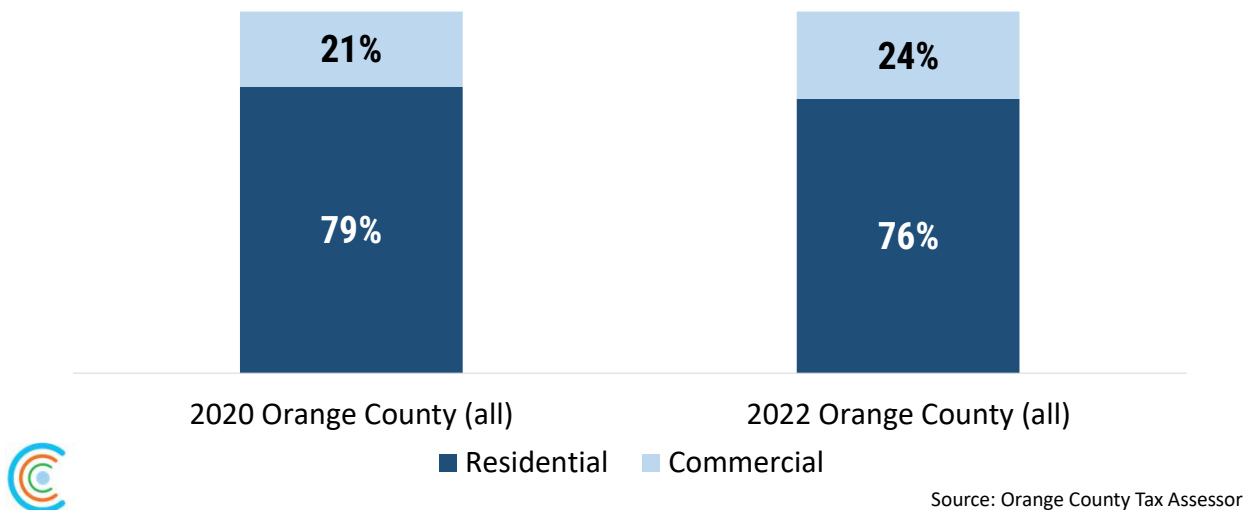
Increase in Orange County assessed value from 2020 to 2022 (in \$billions)



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Orange County Commercial Assessed Value Grows from 21% to 24% of Total Assessed Value

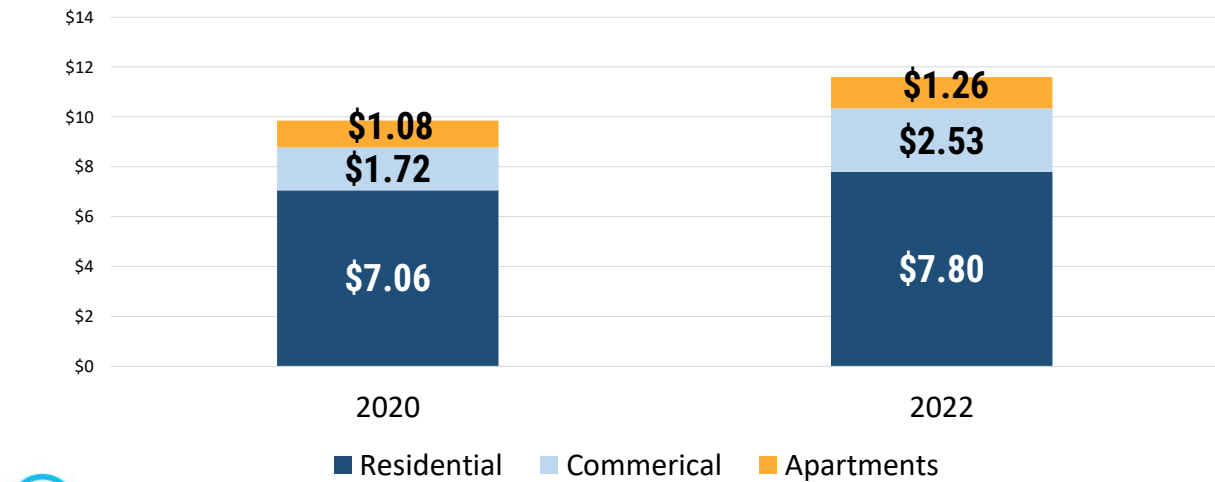
Commercial and residential assessed value percentages comparing 2020 with 2022 across Orange County
Apartment Value assigned to either Commercial (for multifamily) or Residential (for single family units)



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Chapel Hill Commercial Value Increases \$810 Million, Residential up \$740 Million from 2020 to 2022

Chapel Hill uses and assessed value (in billions)



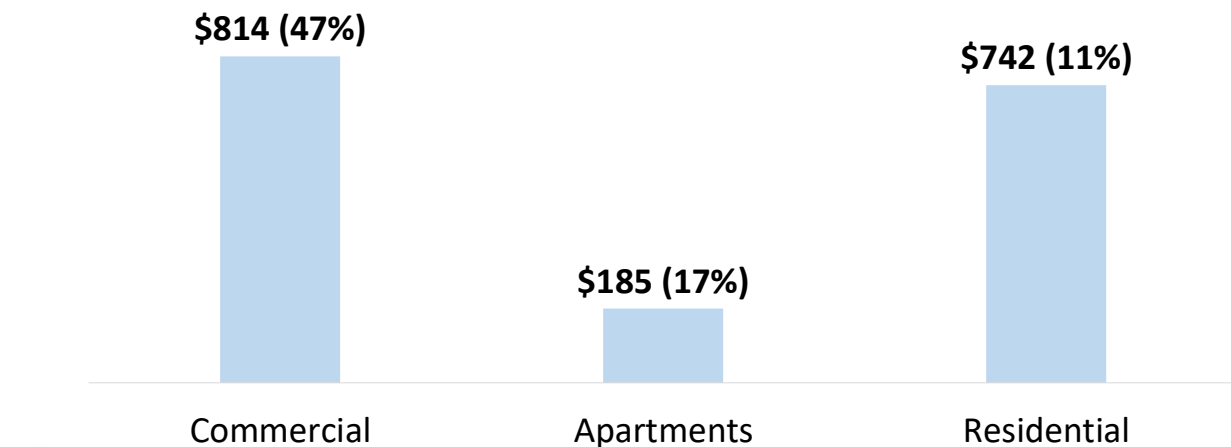
Chapel Hill 2022 Total: \$11.6 Billion

Source: Orange County Tax Assessor

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Chapel Hill Commercial Assessed Value Increases by 47% from 2020 to 2022

Change in Chapel Hill assessed commercial value from 2020 to 2022 (in \$millions)

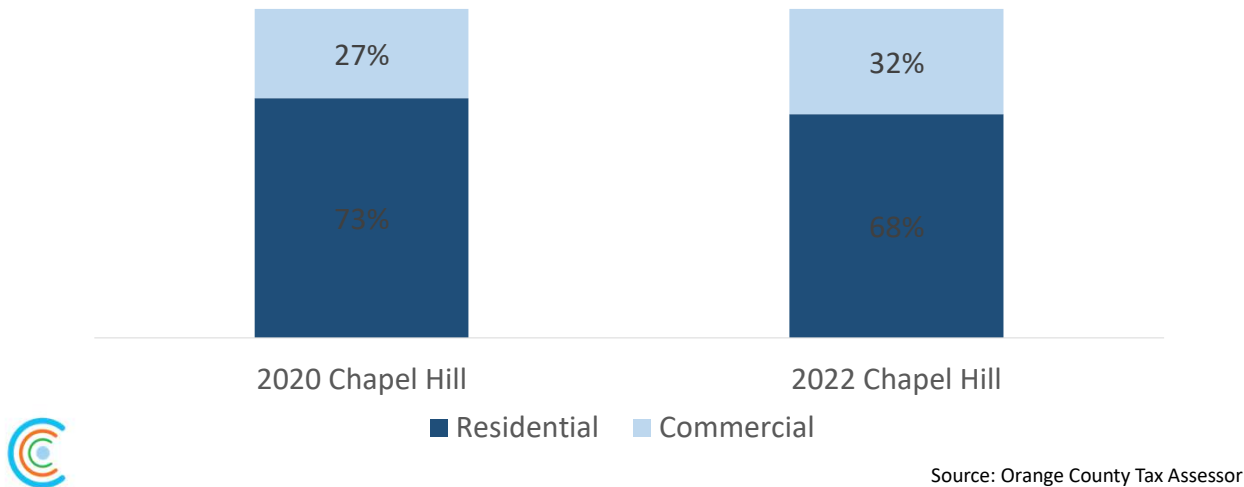


Source: Orange County Tax Assessor

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Chapel Hill Commercial Assessed Value Grows from 27% to 32% of Total Assessed Value

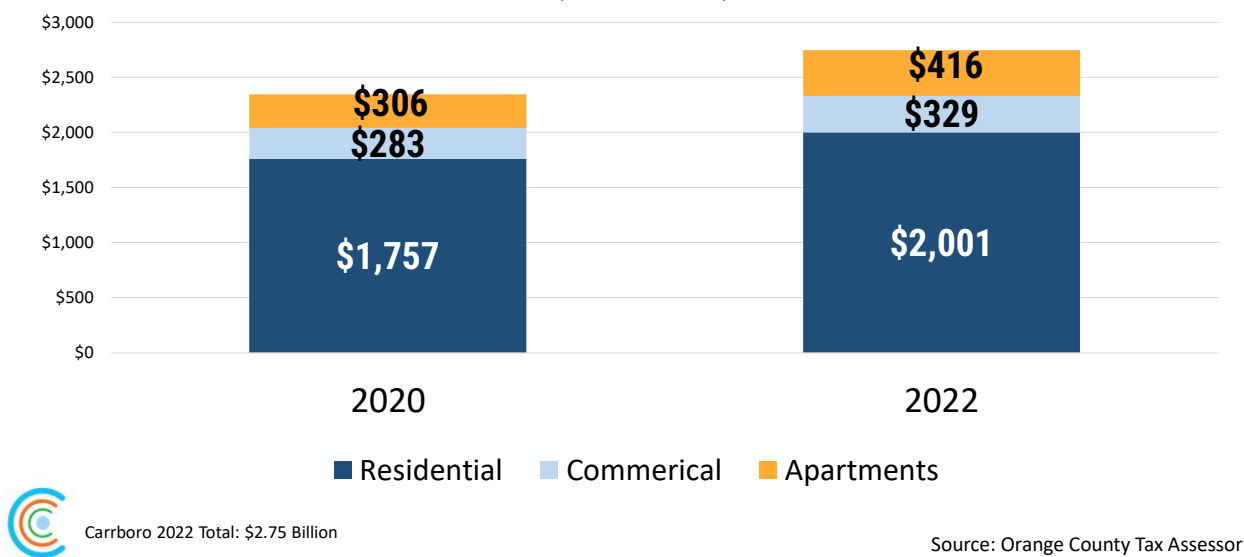
Commercial and residential assessed value percentages comparing 2020 with 2022 across Orange County
Apartment Value assigned to either Commercial (for multifamily) or Residential (for single family units)



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Carrboro Apartment Value up \$110 million, Commercial up \$46 million, from 2020 to 2022

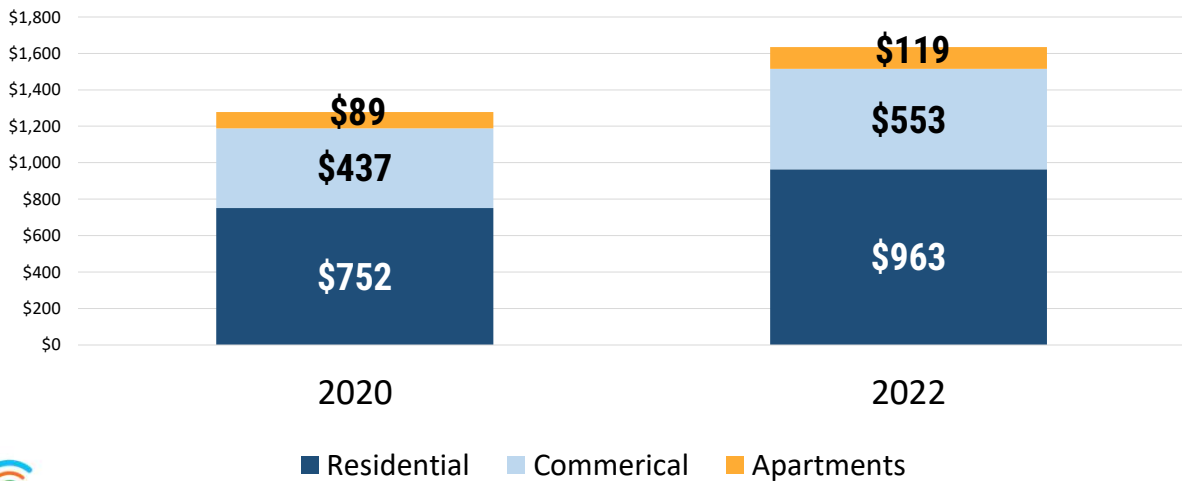
Carrboro uses and assessed value (in millions)



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Hillsborough Total Assessed Value Grows by \$357 million (28%), Across all Sectors, from 2020 to 2022

Hillsborough uses and assessed value (in millions)



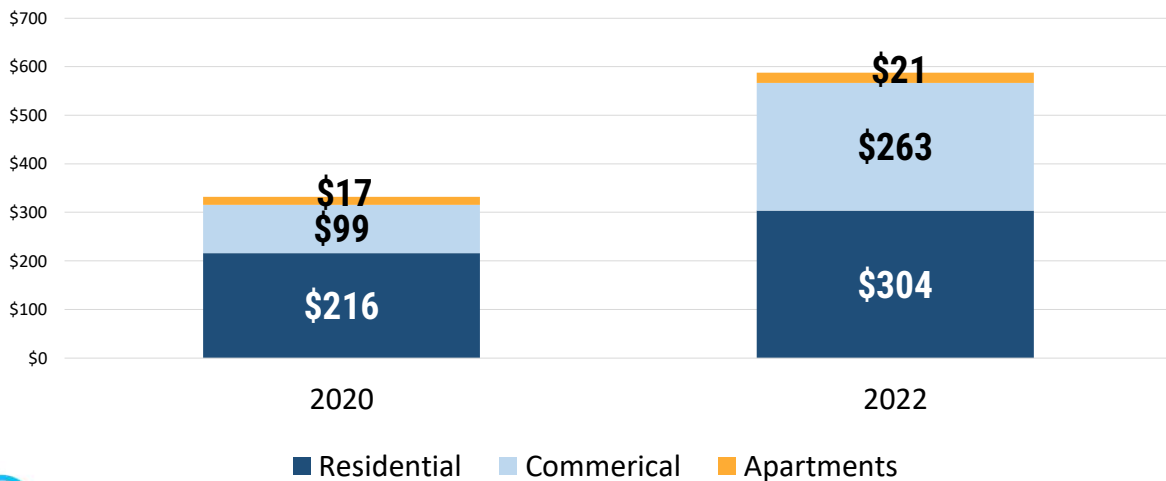
Hillsborough 2022 Total: \$1.63 Billion

Source: Orange County Tax Assessor

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Mebane (in Orange County) Value Increases by 77% to \$588 million from 2020 to 2022

Mebane (Orange County Only) uses and assessed value (in millions)



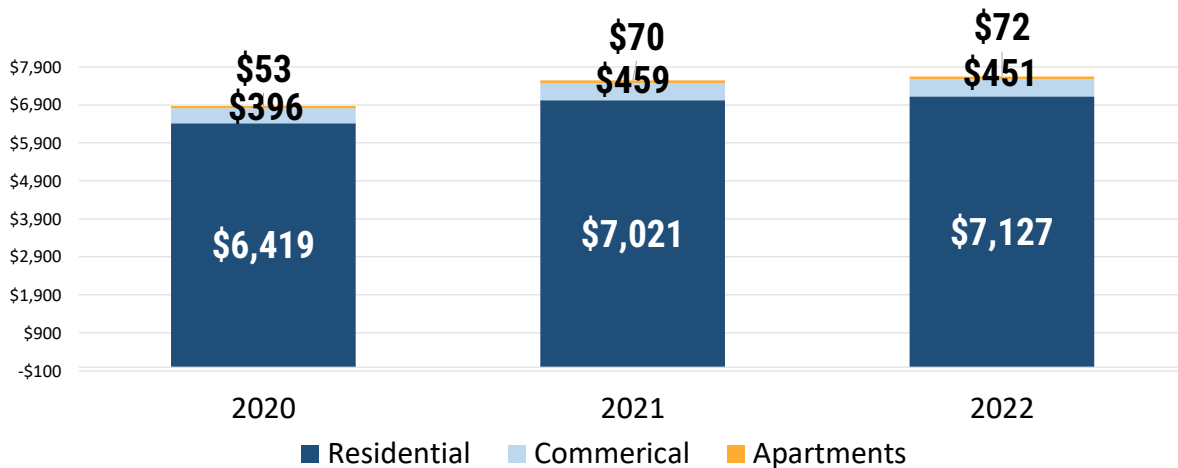
Mebane (in Orange) 2022 Total: \$588 million

Source: Orange County Tax Assessor

22

Residential Property is 93% of Unincorporated Orange County's Assessed Value in 2022. Total Value Up 11%

Unincorporated Orange County uses and assessed value (in millions)



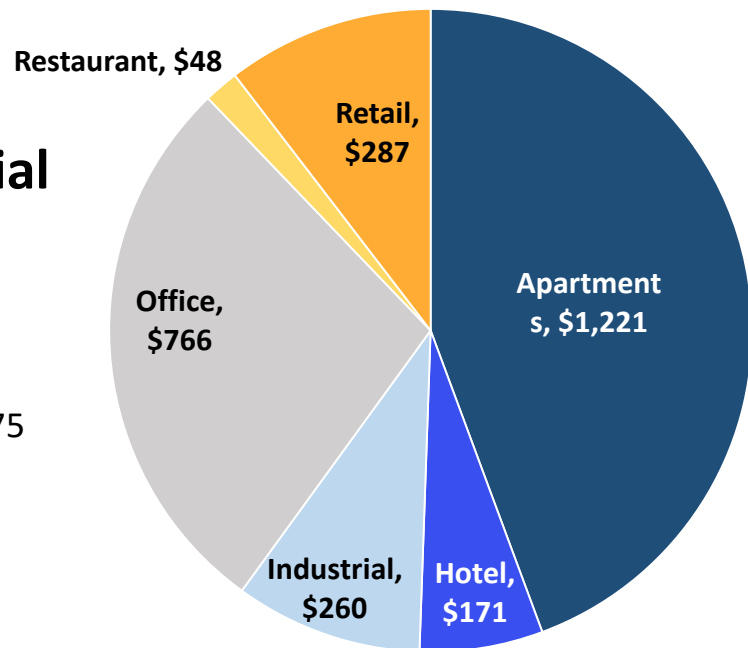
Unincorporated Orange 2022 Total: \$7.6 Billion

Source: Orange County Tax Assessor

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2021 Orange County Commercial Building Value By Sector (in millions)

Total commercial value: \$2.75 billion

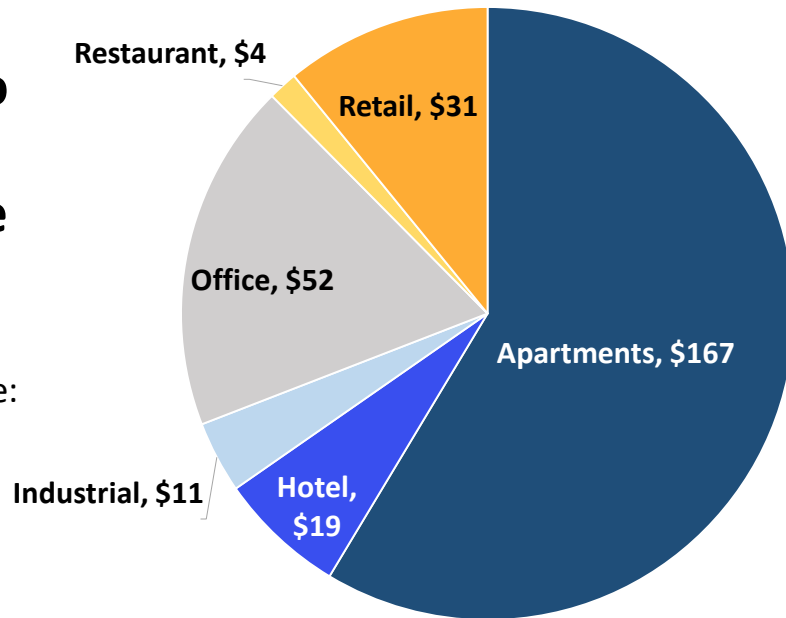


Source: Orange County Tax Assessor

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2021 Carrboro Commercial Building Value by Sector (in millions)

Total commercial value: \$284 million

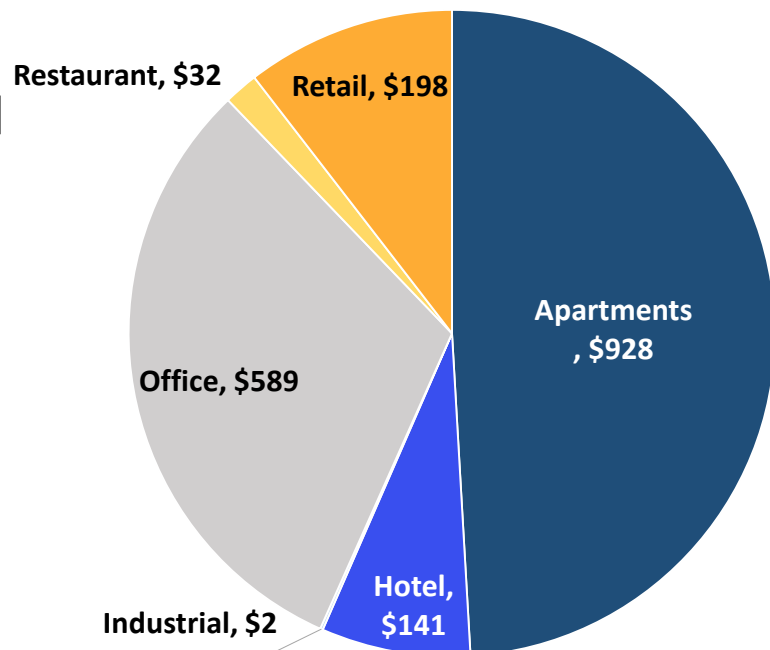


Source: Orange County Tax Assessor

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2021 Chapel Hill Commercial Building Value by Sector (in millions)

Total commercial value: \$1.89 billion

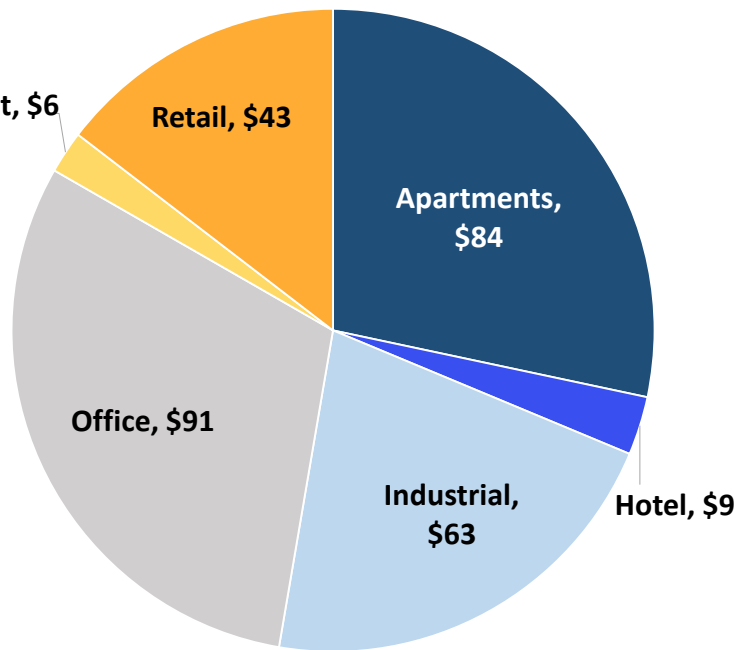


Source: Orange County Tax Assessor

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2021 Hillsborough Commercial Building Value by Sector (in millions)

Total commercial value:
\$296 million

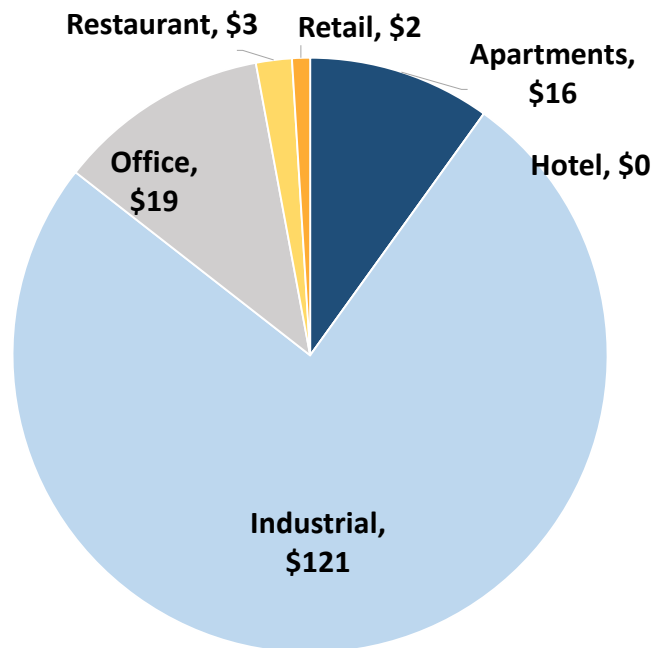


Source: Orange County Tax Assessor

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2021 Mebane (Orange County portion) Commercial Building Value by Sector (in millions)

Total commercial value:
\$161 million

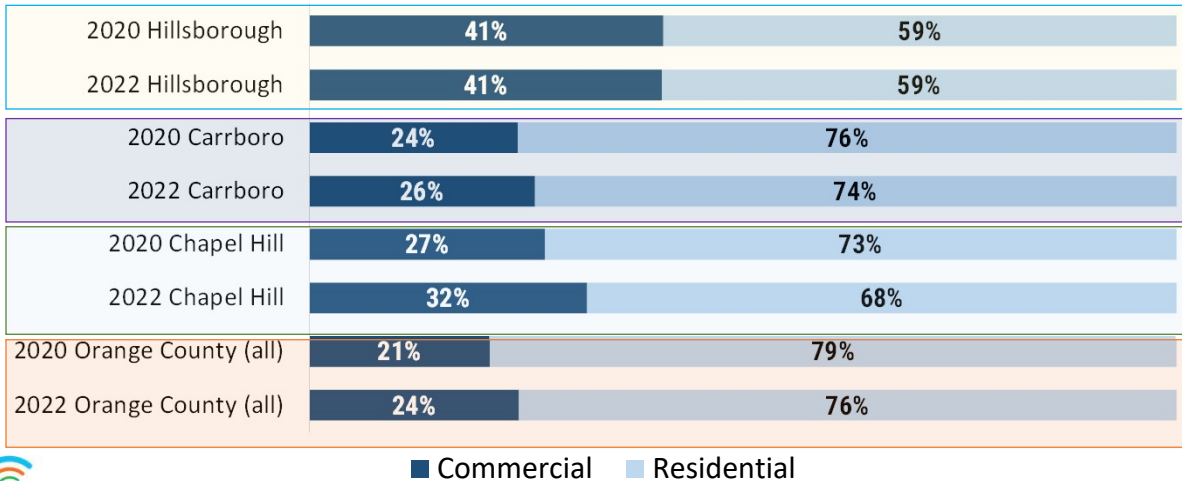


Source: Orange County Tax Assessor

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Commercial Assessed Value, as a Percent of Total Value, Grows from 2020 to 2022

Commercial and residential assessed value percentages comparing 2020 with 2022 across Orange County (Apartment Value assigned to either Commercial (for multifamily) or Residential (for single family units))



Source: Orange County Tax Assessor

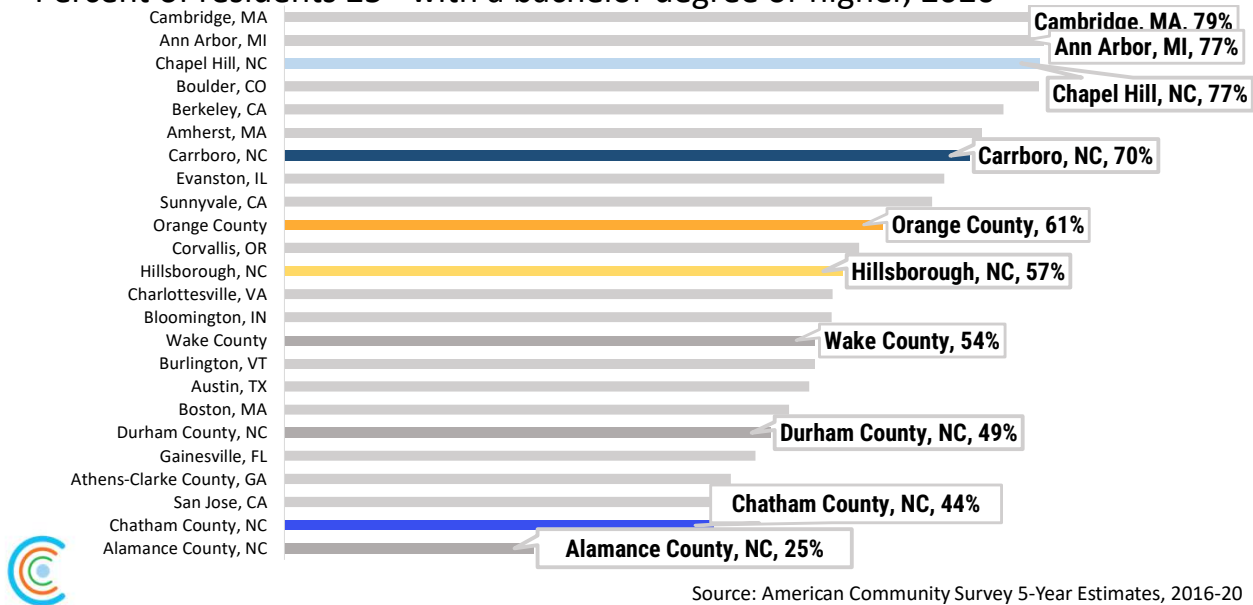
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Demographics: Educational Attainment

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Percent of Residents with a Bachelor Degree or Higher

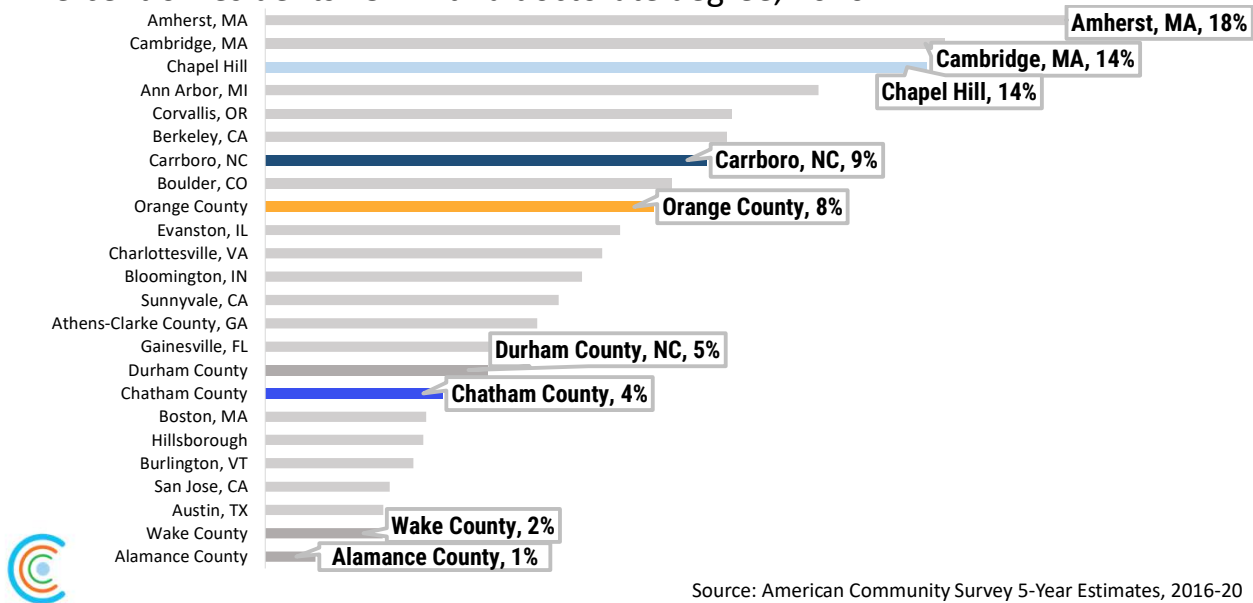
Percent of residents 25+ with a bachelor degree or higher, 2020



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Percent of Residents with a Doctorate Degree

Percent of residents 25+ with a doctorate degree, 2020

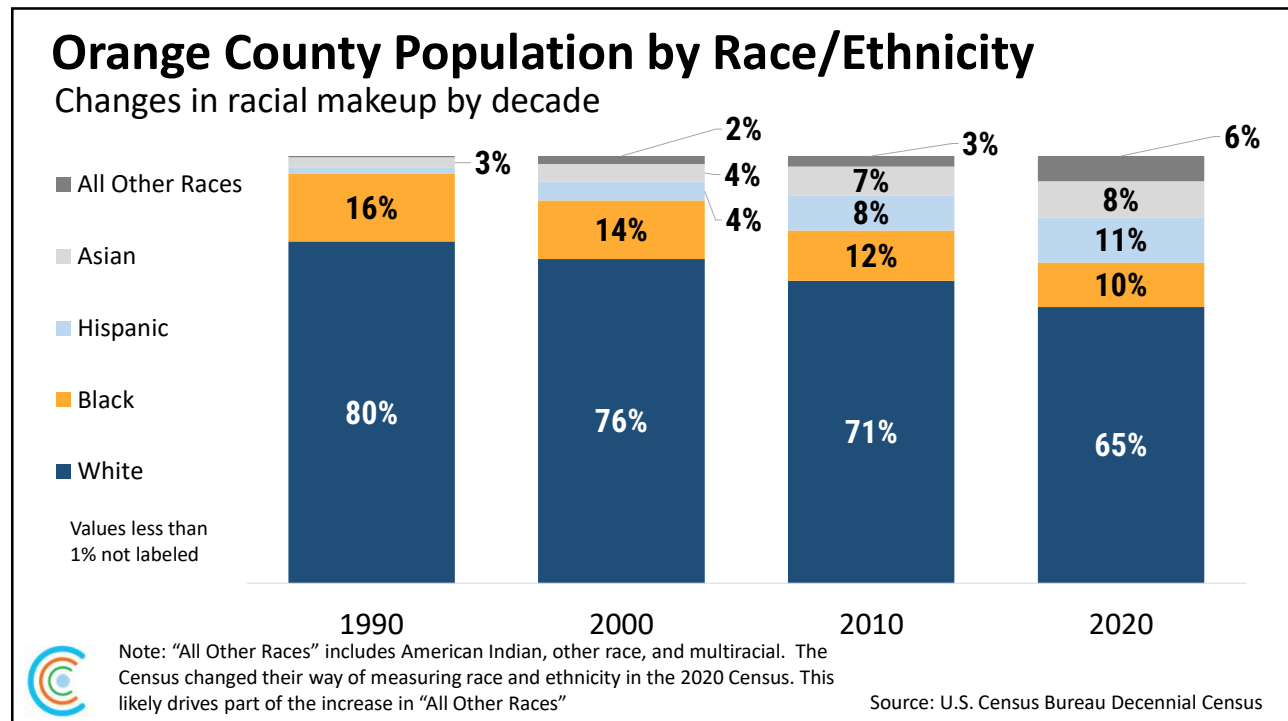


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Demographics: Race and Ethnicity



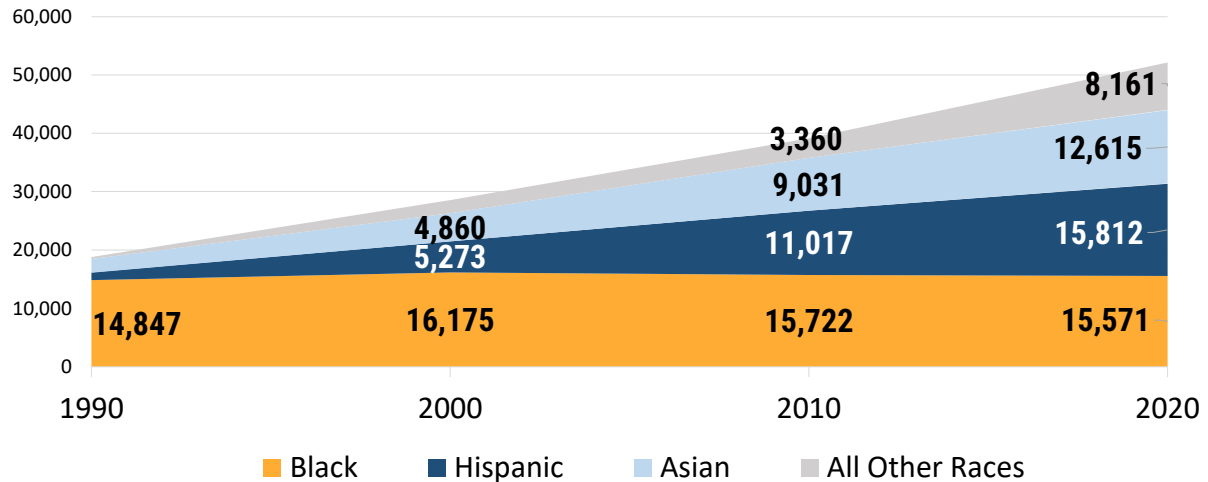
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Orange Minority Population by Race/Ethnicity

Changes in racial/ethnic makeup by decade



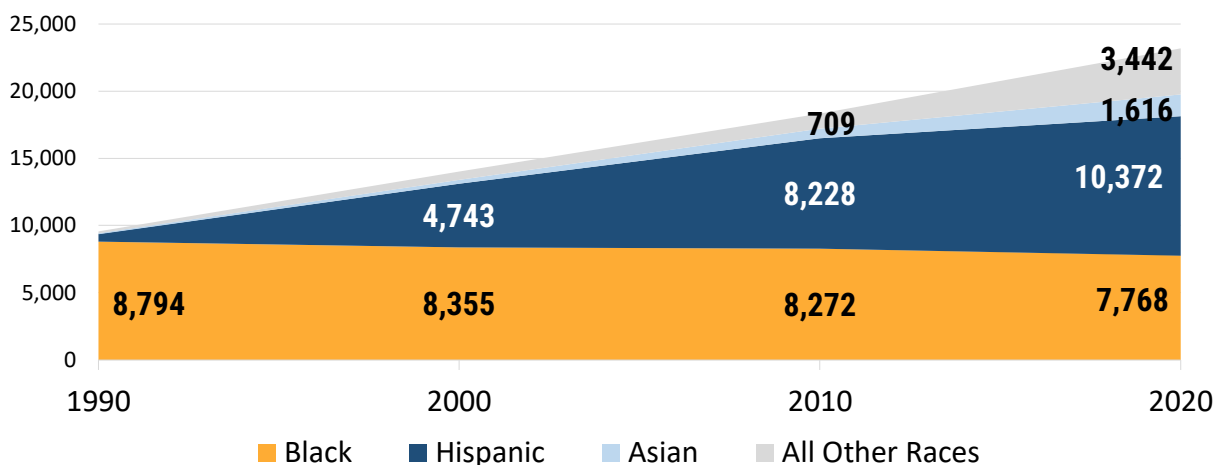
Note: "All Other Races" includes American Indian, other race, and multiracial. The Census changed their way of measuring race and ethnicity in the 2020 Census. This likely drives part of the increase in "All Other Races"

Source: U.S. Census Bureau Decennial Census

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Chatham Minority Population by Race/Ethnicity

Changes in racial/ethnic makeup by decade



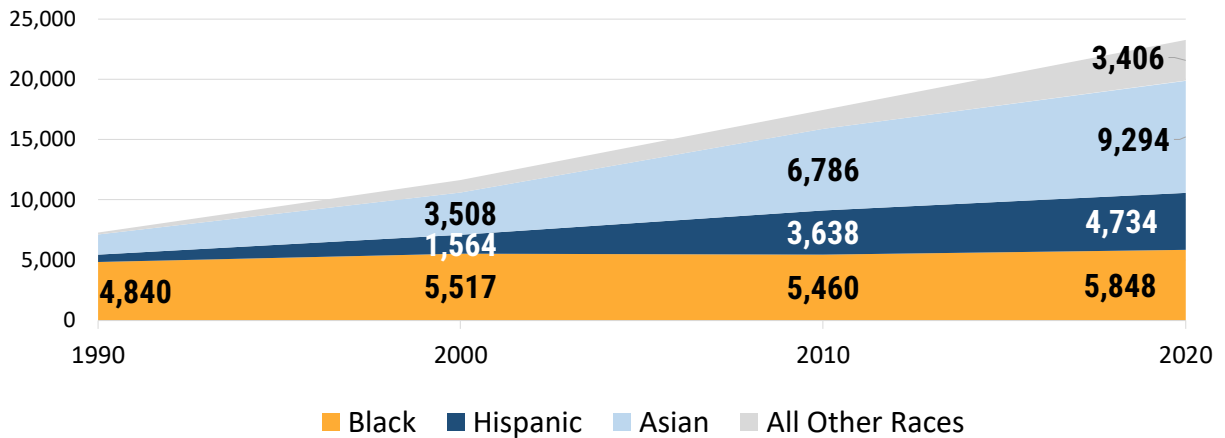
Note: "All Other Races" includes American Indian, other race, and multiracial. The Census changed their way of measuring race and ethnicity in the 2020 Census. This likely drives part of the increase in "All Other Races"

Source: U.S. Census Bureau Decennial Census

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Chapel Hill Minority Population by Race/Ethnicity

Changes in racial/ethnic makeup by decade



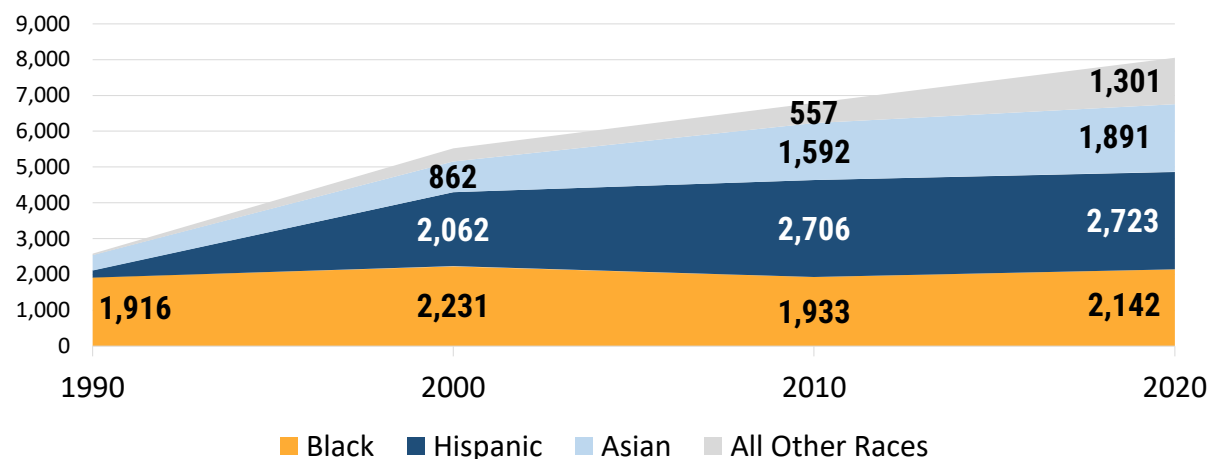
Note: "All Other Races" includes American Indian, other race, and multiracial. The Census changed their way of measuring race and ethnicity in the 2020 Census. This likely drives part of the increase in "All Other Races"

Source: U.S. Census Bureau Decennial Census

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Carrboro Minority Population by Race/Ethnicity

Changes in racial/ethnic makeup by decade



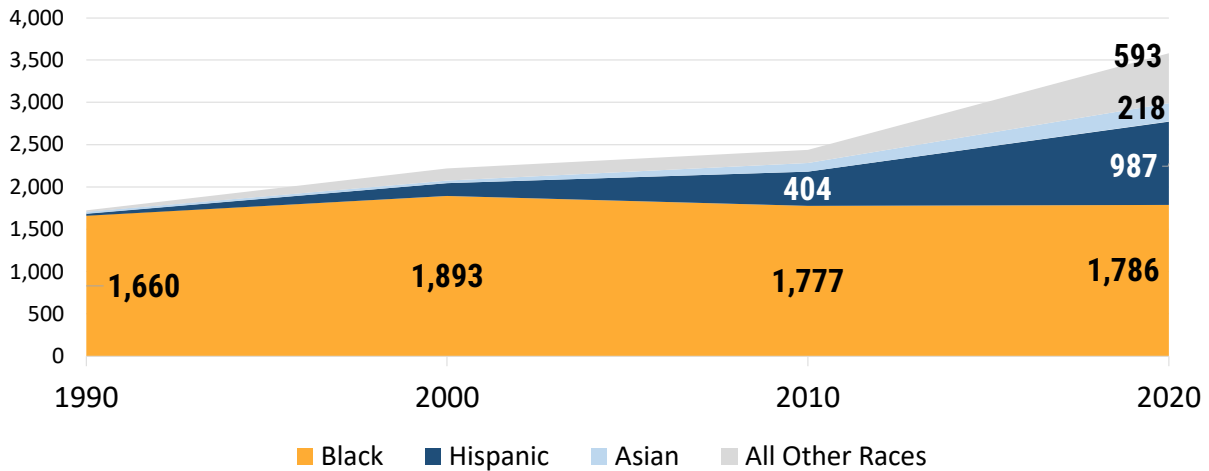
Note: "All Other Races" includes American Indian, other race, and multiracial. The Census changed their way of measuring race and ethnicity in the 2020 Census. This likely drives part of the increase in "All Other Races"

Source: U.S. Census Bureau Decennial Census

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Hillsborough Minority Population by Race/Ethnicity

Changes in racial/ethnic makeup by decade

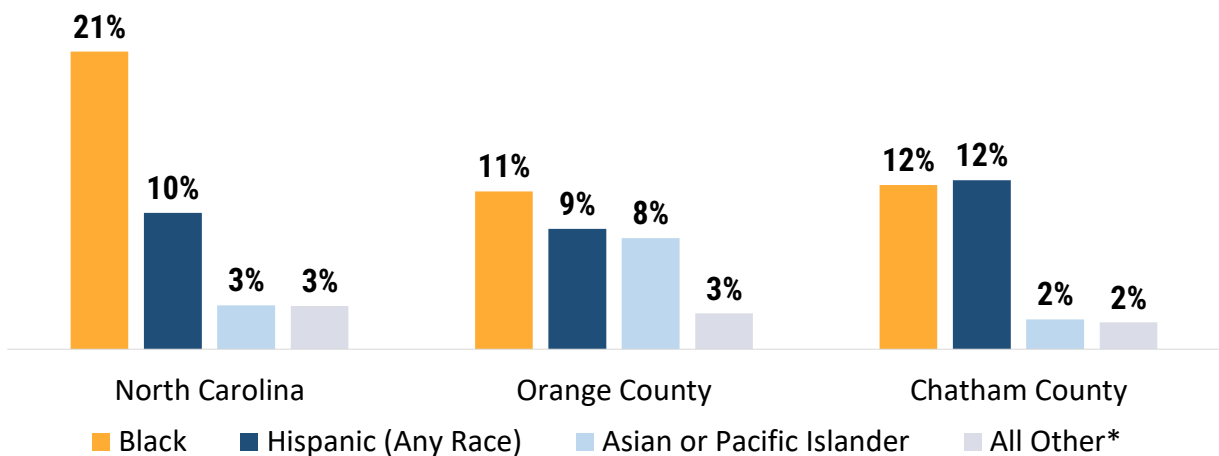


Note: "All Other Races" includes American Indian, other race, and multiracial. The Census changed their way of measuring race and ethnicity in the 2020 Census. This likely drives part of the increase in "All Other Races"

Source: U.S. Census Bureau Decennial Census

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State and County Minority Make-Up (2020)

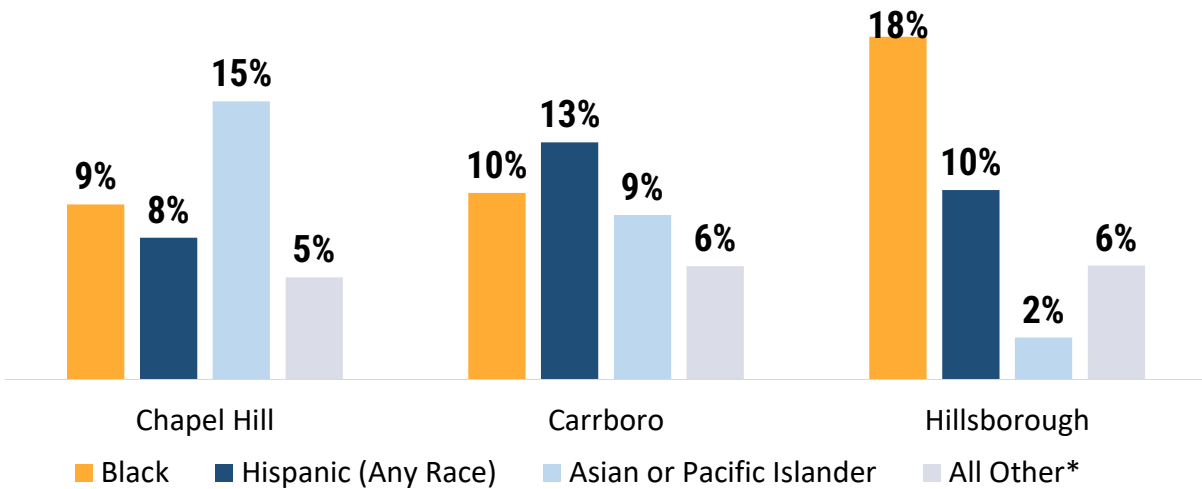


Note: "All Other Races" includes American Indian, other race, and multiracial. The Census changed their way of measuring race and ethnicity in the 2020 Census. This likely drives part of the increase in "All Other Races"

Source: U.S. Census Bureau Decennial Census

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Municipal Minority Make-Up (2020)



Note: "All Other Races" includes American Indian, other race, and multiracial. The Census changed their way of measuring race and ethnicity in the 2020 Census. This likely drives part of the increase in "All Other Races"

Source: U.S. Census Bureau Decennial Census

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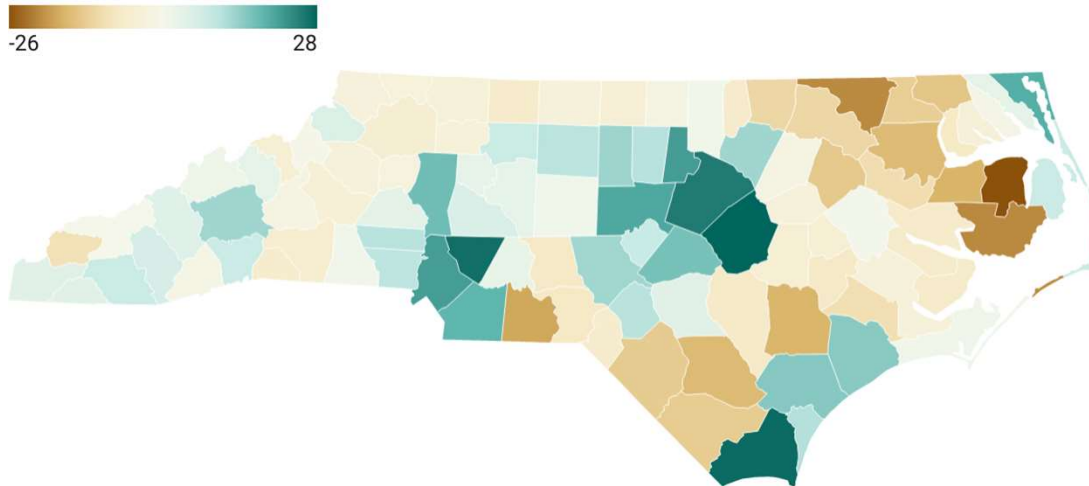
Population Growth 2010-2020



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Fastest Growth in Triangle, Charlotte, Wilmington

Population growth rate (%) for NC counties, 2010-2020



Source: US Census Bureau

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Chapel Hill and Carrboro Grow Less Than 1% Per Year, Hillsborough Averages 4.6% Per Year From 2010 to 2020

2010 and 2020 population totals, growth rate over the decade, and local annual growth rates

	2010	2020	Percent Growth 2010 to 2020	Annual Growth Rate
Orange County	133,801	148,696	11%	1.1%
Hillsborough	6,087	9,660	59%	4.6%
Carrboro	19,582	21,295	9%	0.8%
Chapel Hill	57,233	61,960	8%	0.8%
Chatham County	63,505	76,285	20%	1.8%
North Carolina	9,535,483	10,439,388	9%	0.9%

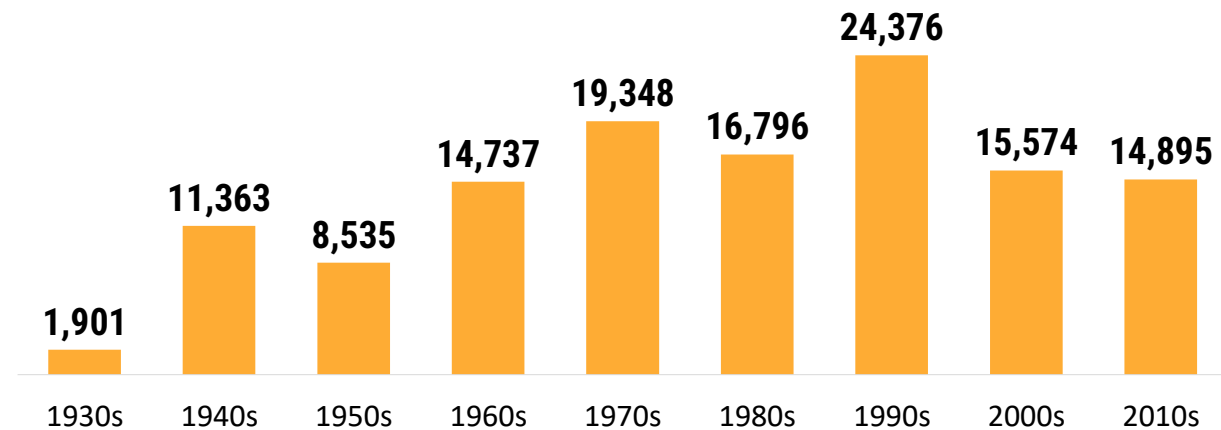


Source: US Census Bureau

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Orange County 2010s Population Increase Similar to Growth in the 1960s

Numeric population growth by decade, 1930-2020

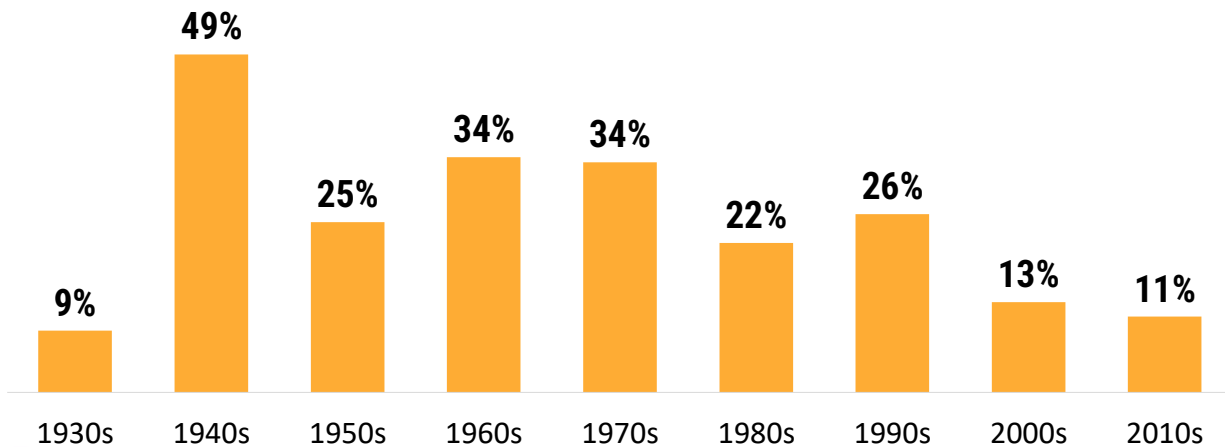


Source: US Census Bureau Decennial Census

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2010s Orange County's Second-Slowest Decade of Growth on Record

Percent population increase by decade, 1930-2020

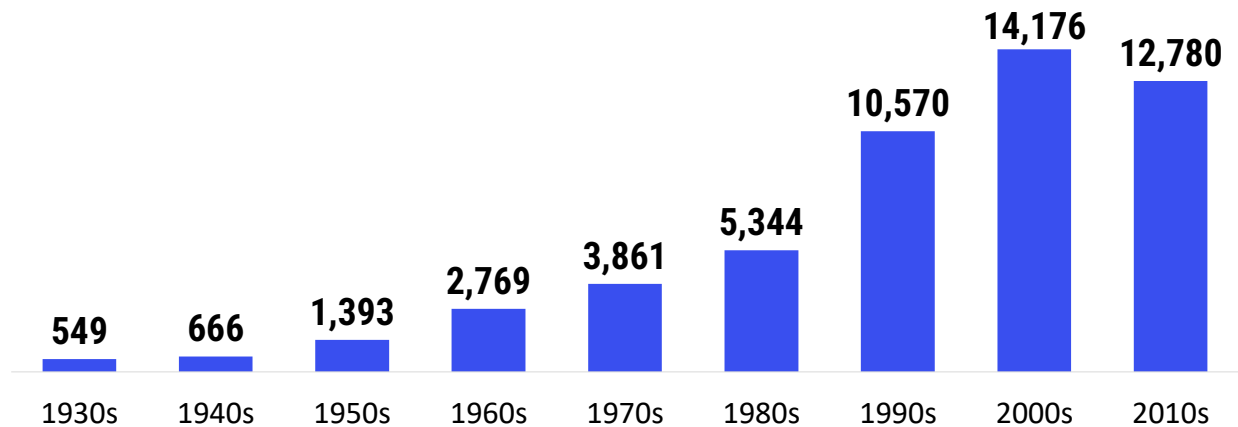


Source: US Census Bureau Decennial Census

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Chatham County Decennial Population Growth Second Largest On Record

Numeric population growth by decade, 1930-2020

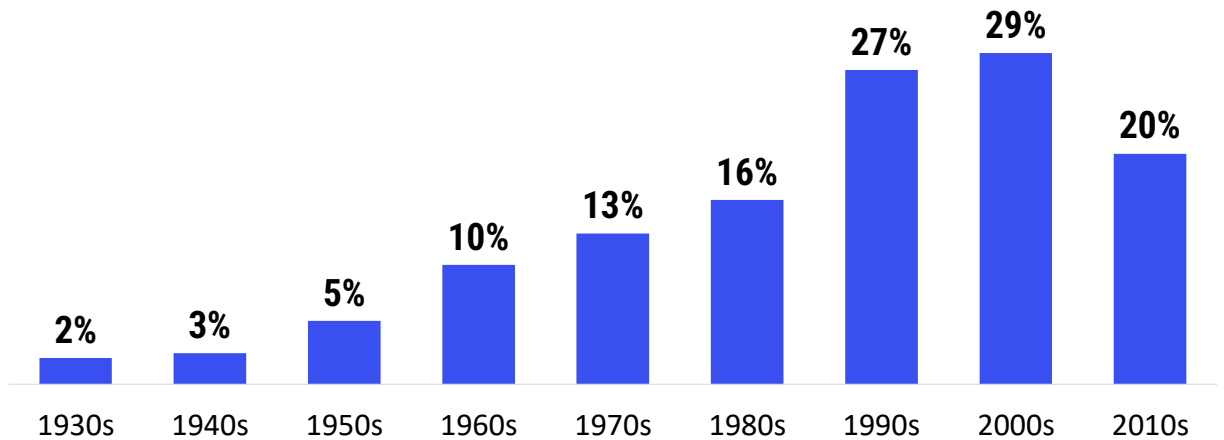


Source: US Census Bureau Decennial Census

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2010s Third-Fastest Decade of Growth for Chatham County

Percent population increase by decade, 1930-2020

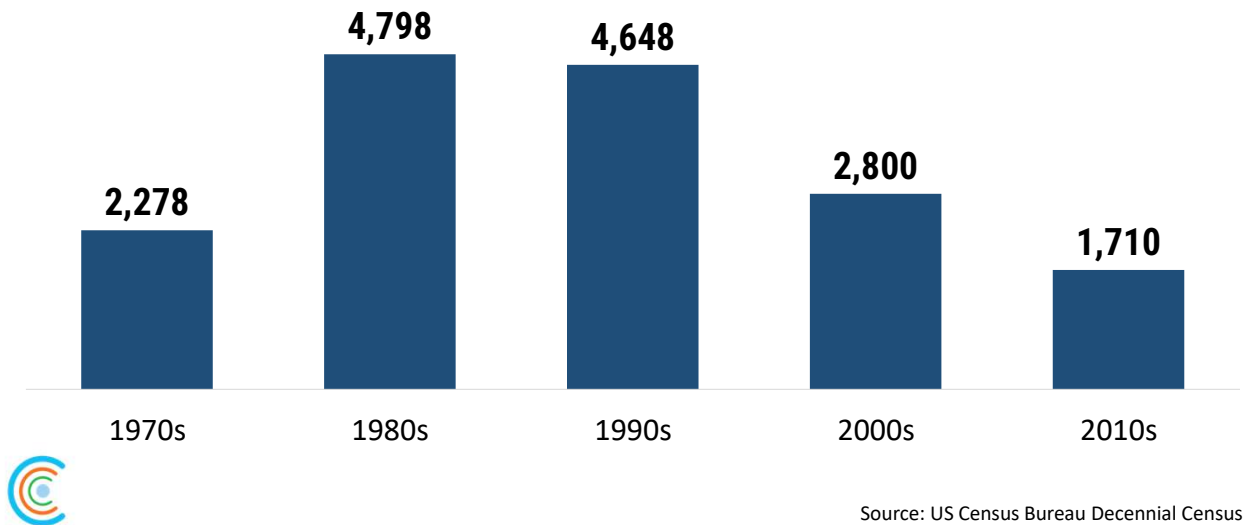


Source: US Census Bureau Decennial Census

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2010s Carrboro's Smallest Numeric Growth Since 1970s

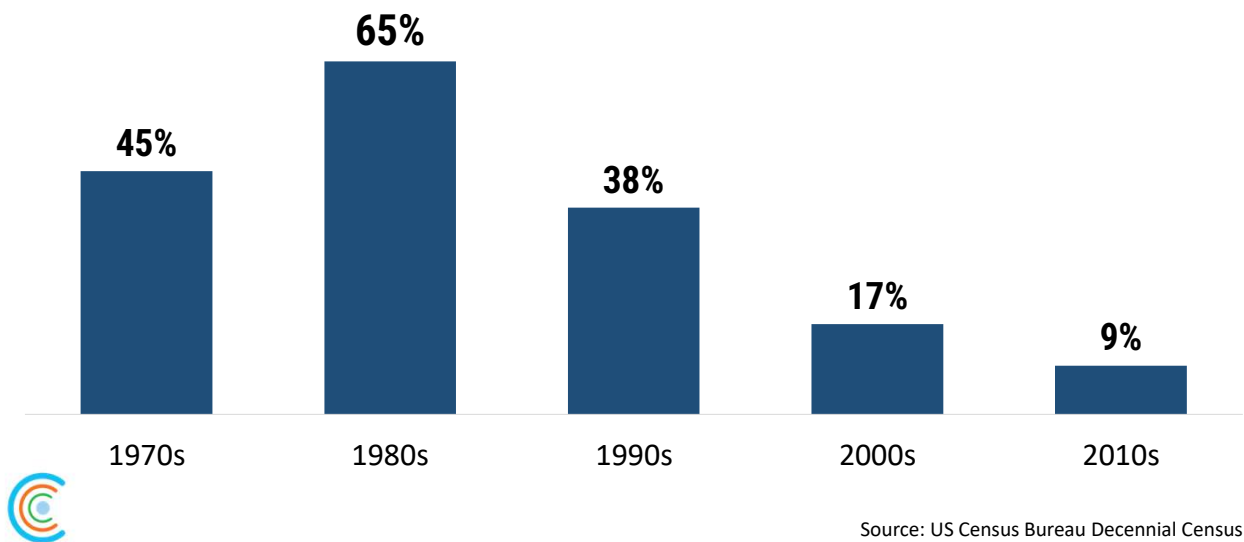
Numeric population growth by decade, 1970-2020



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2010s Slowest-Growing Decade for Carrboro Since 1970s

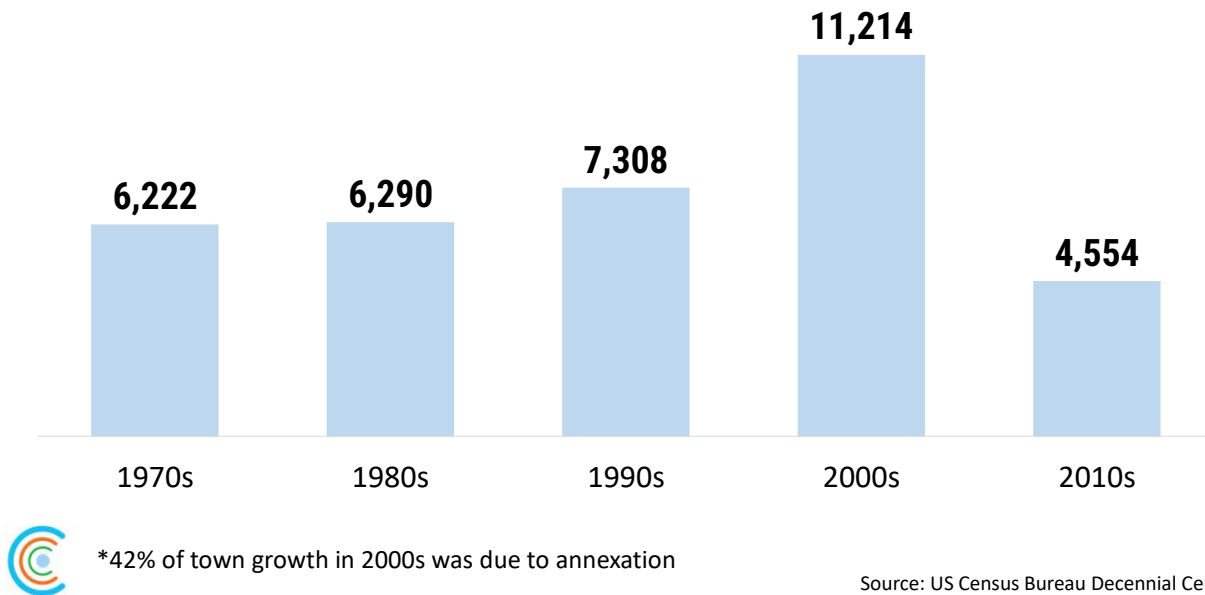
Percent population increase by decade, 1970-2020



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2010s Mark Significant Drop from Chapel Hill's 2000s Peak*

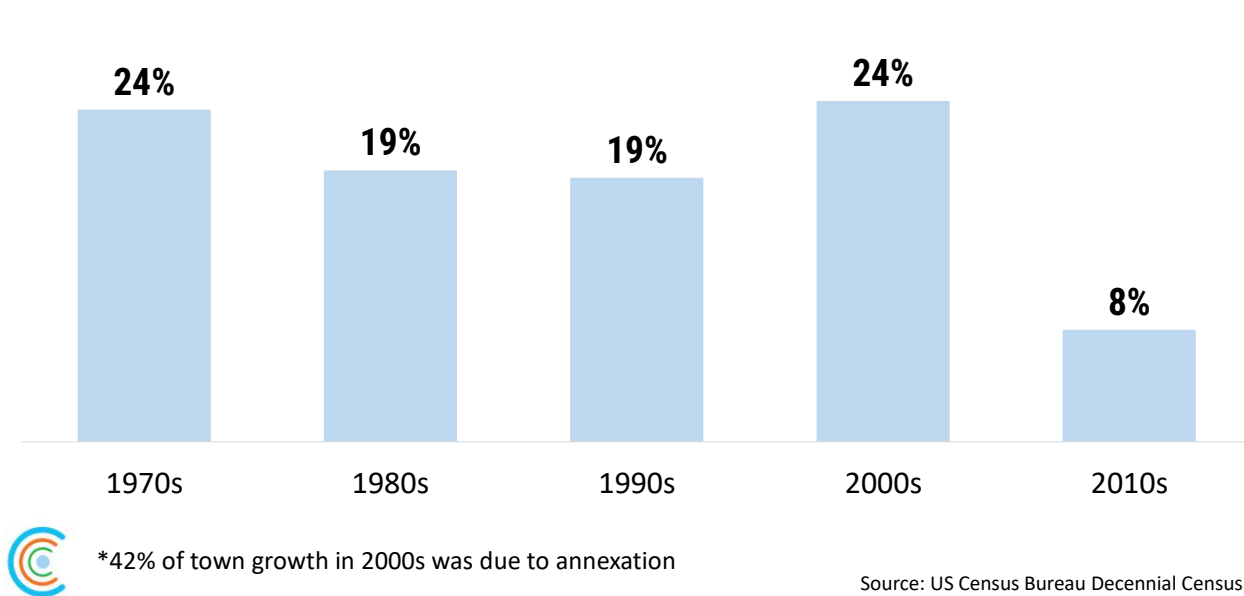
Numeric population growth by decade, 1970-2020



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2010s Slowest-Growing Decade for Chapel Hill Since 1970s

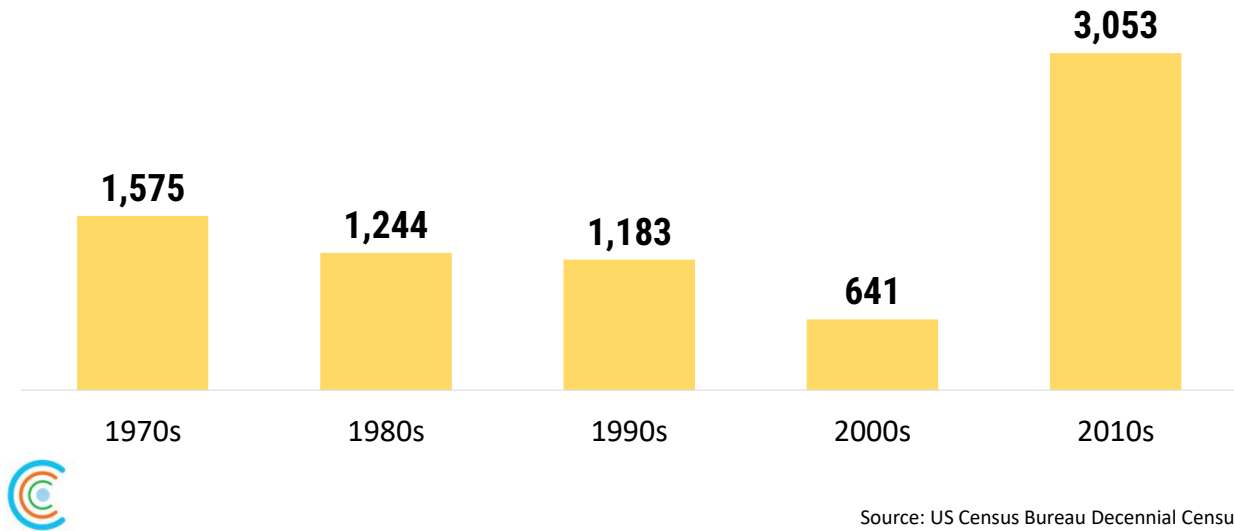
Percent population increase by decade, 1970-2020



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Hillsborough's 2010s Population Growth Largest Since 1970s

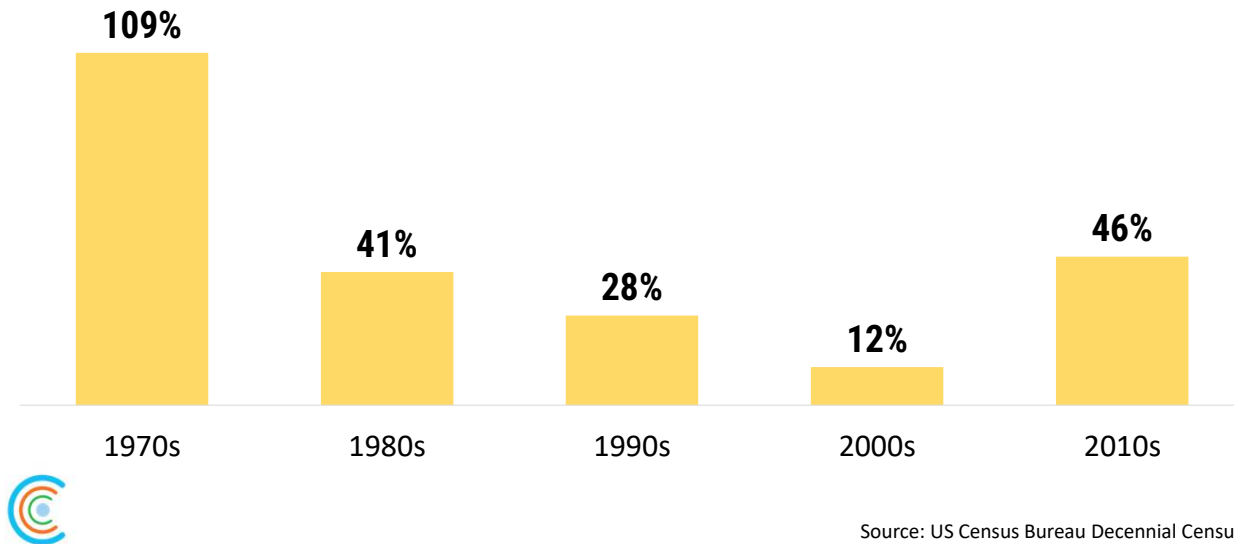
Numeric population growth by decade, 1970-2020



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2010s Second-Fastest-Growing Decade for Hillsborough Since 1970s

Percent population increase by decade, 1970-2020



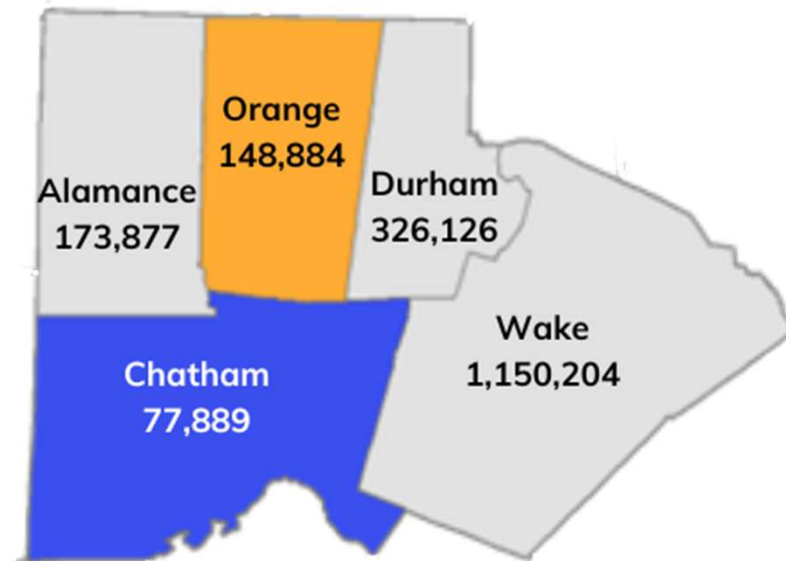
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Population Growth 2020-2021



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2021 County Population Totals

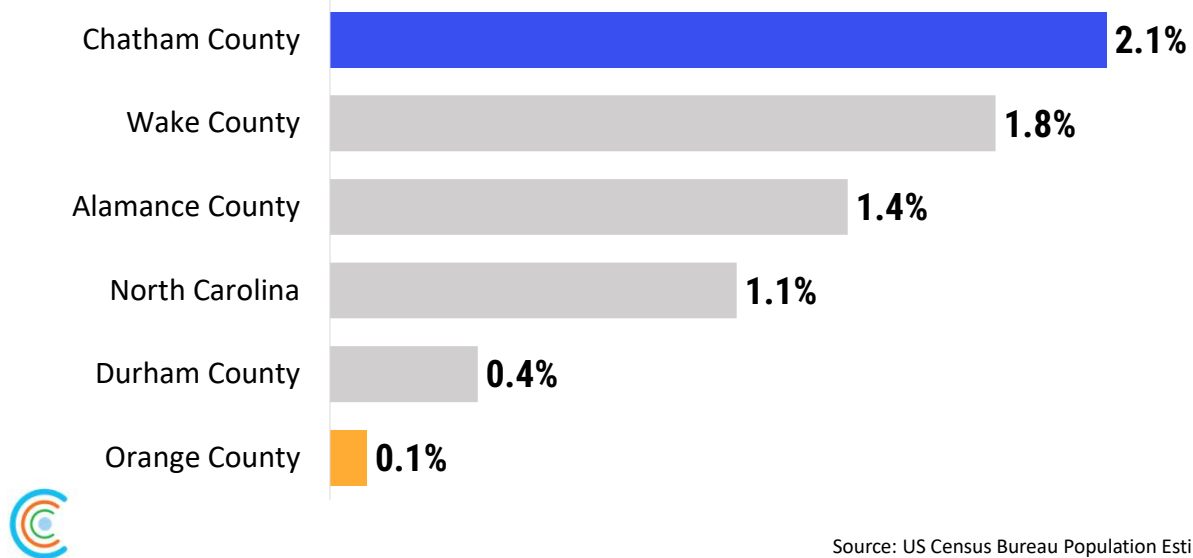


Source: US Census Bureau Population Estimates

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Chatham Grows Fastest Among Peer Counties in 2021

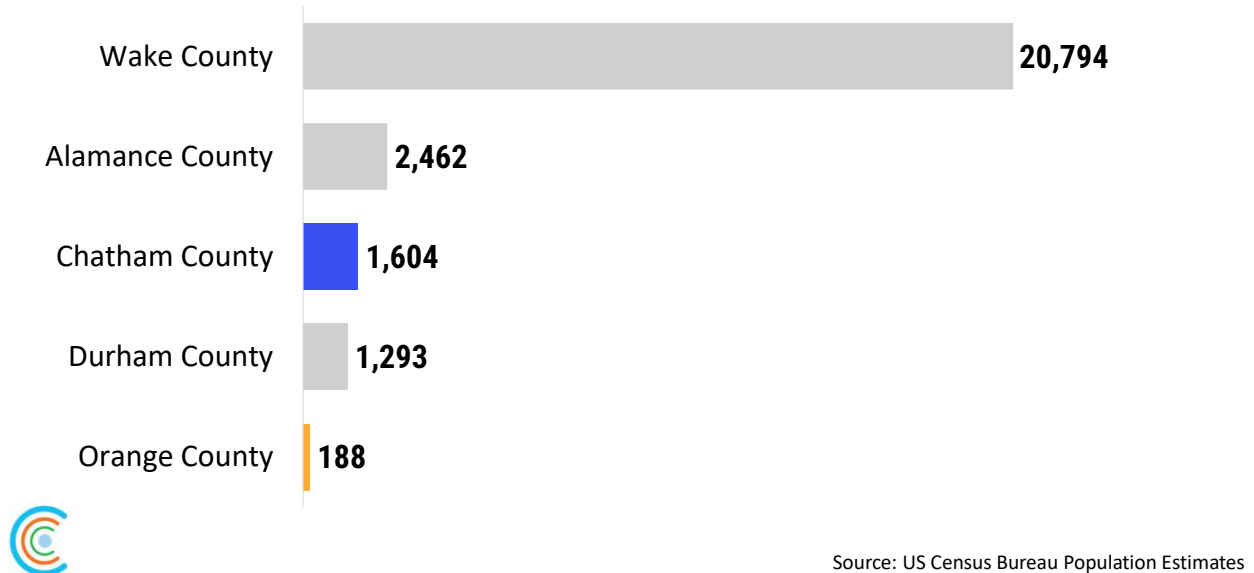
Percentage population growth from 2020 to 2021



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Population Gain in 2021 Smallest in Orange County

Numeric population growth, 2020 to 2021 (North Carolina added 111,774 in same period)



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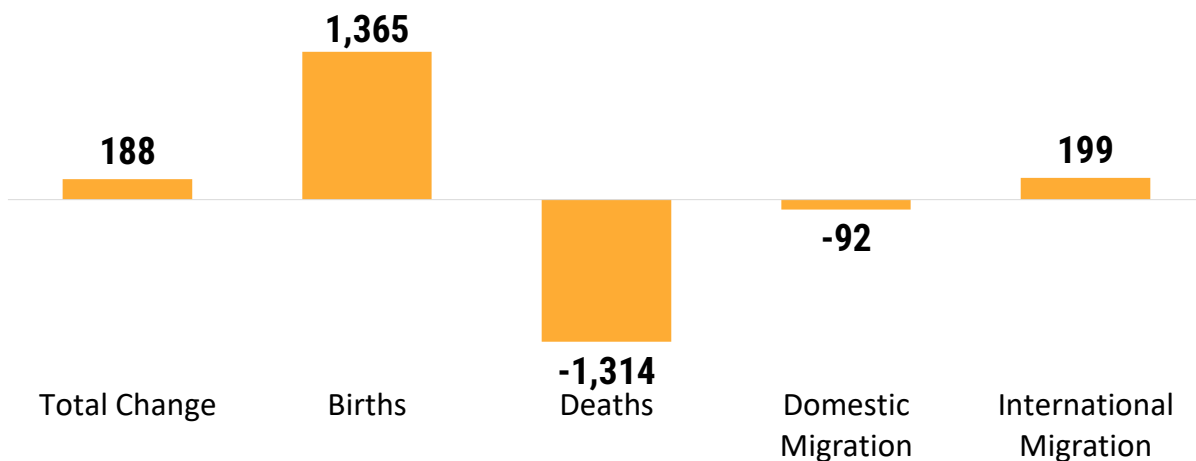
Components of Population Change 2020-2021



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Minimal Growth in Orange County from 2020 to 2021

Components of Orange County's estimated 188-person growth, 2020 to 2021



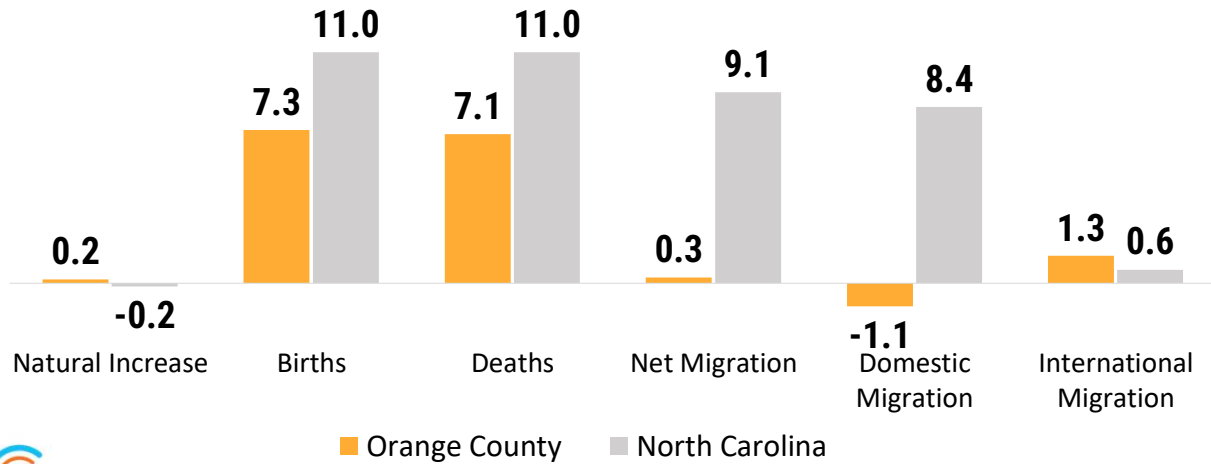
Note: The difference between total change and the sum of the individual components of change is known as the "residual." It is not shown here.

Source: U.S. Census Bureau Population Estimates

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Orange County Lags Behind North Carolina in Birth, Death, and Migration

Average annual rates of vital events per 1,000 people, Orange County compared to North Carolina (April 1, 2020 - July 1, 2021)

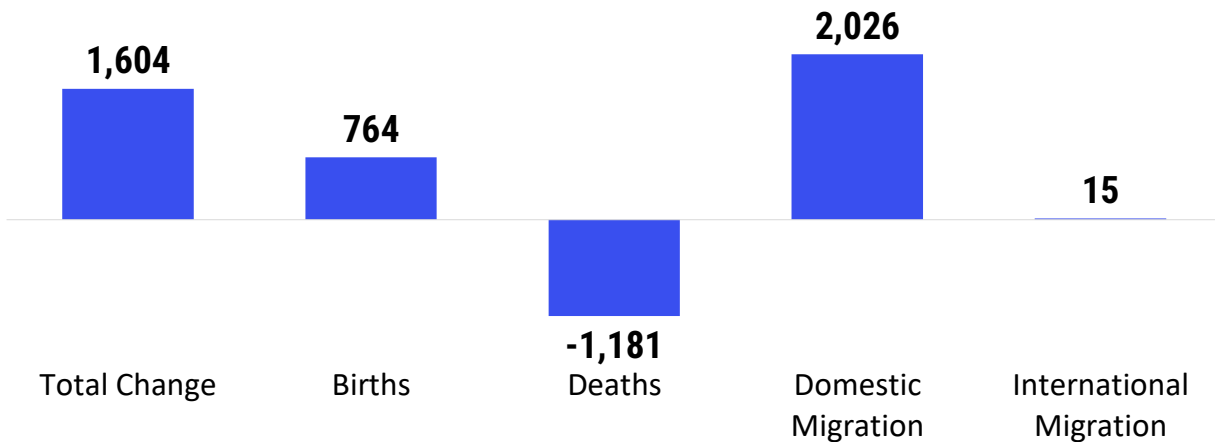


Source: U.S. Census Bureau Population Estimates

61

Domestic Migration Drives Growth in Chatham County

Components of Chatham County's estimated 1,604-person growth, (April 1, 2020 - July 1, 2021)



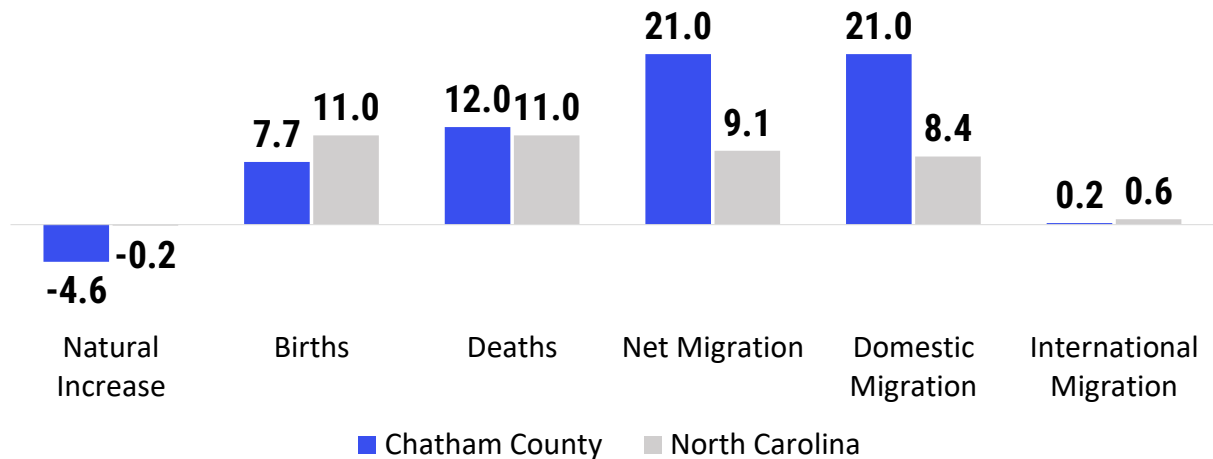
Note: The difference between total change and the sum of the individual components of change is known as the "residual." It is not shown here.

Source: US Census Bureau Population Estimates

62

Chatham Net Migration Outpaces State Average

Average annual rates of vital events per 1,000 people, Chatham County compared to North Carolina (April 1, 2020 - July 1, 2021)

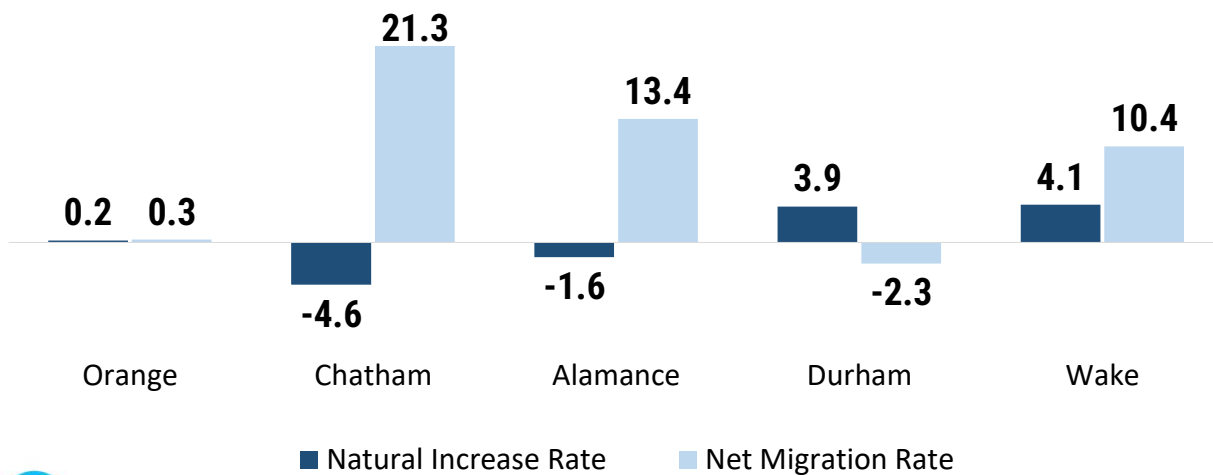


Source: US Census Bureau Population Estimates

63

Counties Vary in the Factors that Drive Growth

Rate of net migration and natural increase (births-deaths) per 1,000 residents, April 1, 2020-June 30, 2021

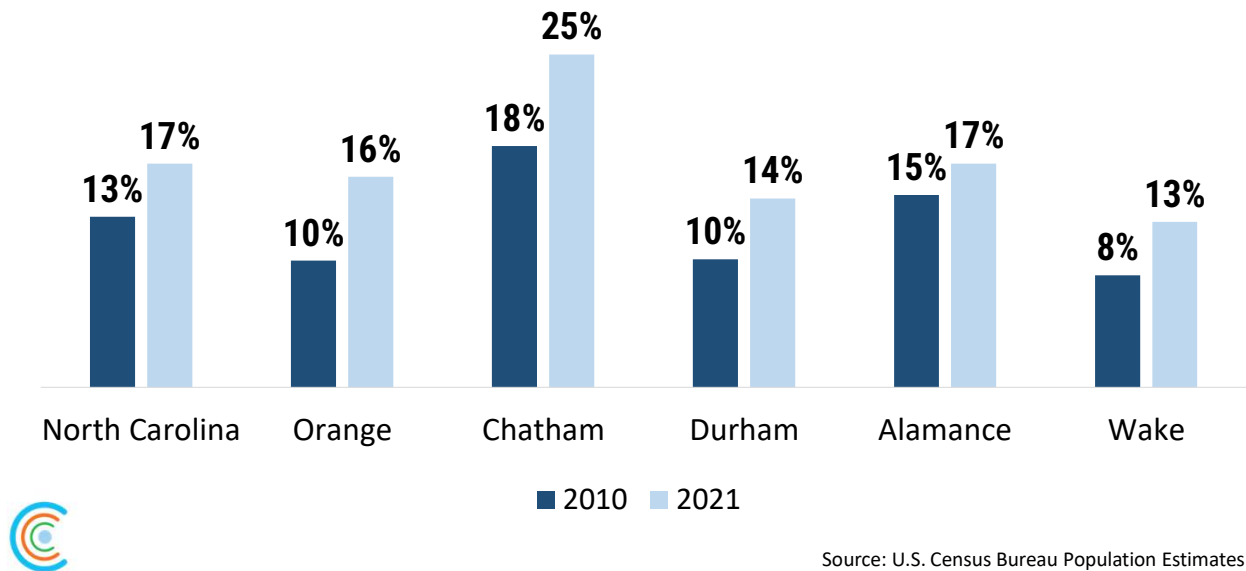


Source: U.S. Census Bureau Population Estimates

64

Share of Population 65+ Increased Statewide, Locally

Proportion of the population aged 65 or older, 2010 vs. 2021



65

Population Projections



66

Three Models for Projecting Growth

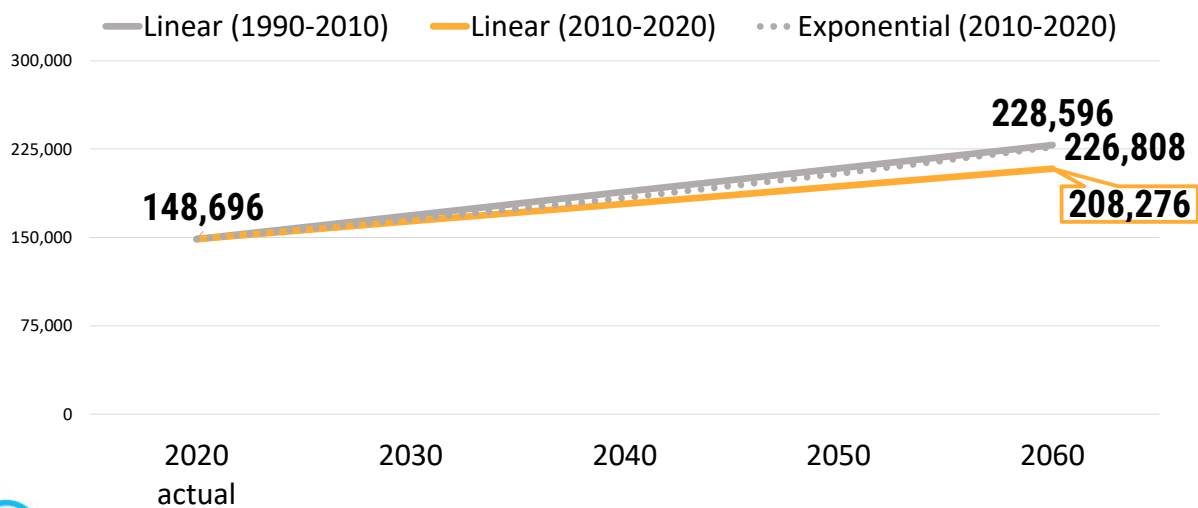
	Exponential (2010-2020)	Linear (1990-2010)	Linear (2010-2020)
Orange County	1.1%	1,998 people per year	1,490 people per year
Chatham County	1.8%	1,237 people per year	1,278 people per year
Carrboro	0.8%	372 people per year	171 people per year
Chapel Hill	0.8%	926 people per year	473 people per year
Hillsborough	4.6%	91 people per year	357 people per year



Source: Decennial Census

67

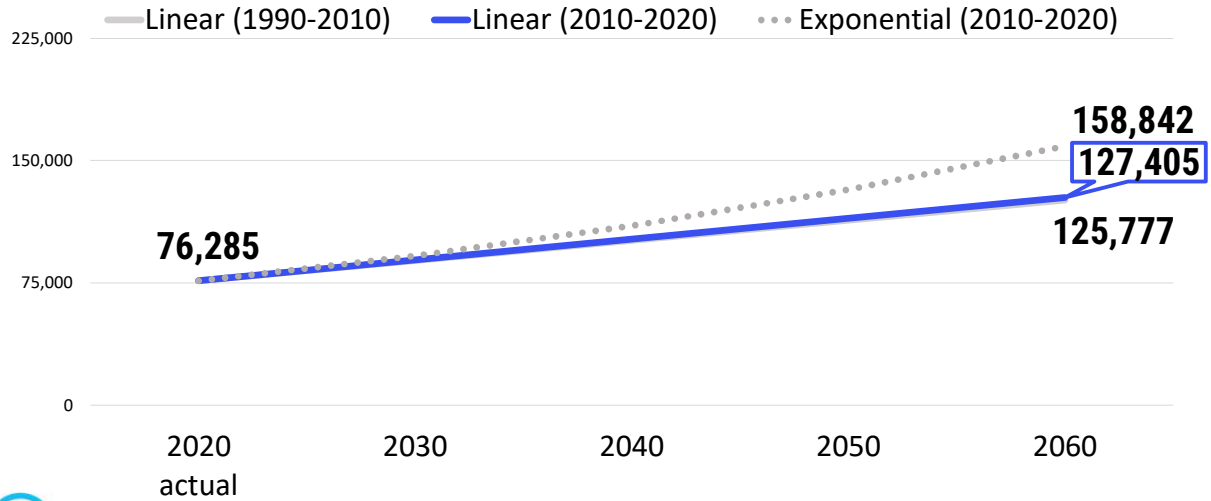
Orange County Population Projections



Source: Decennial Census; projections by Carolina Demography

68

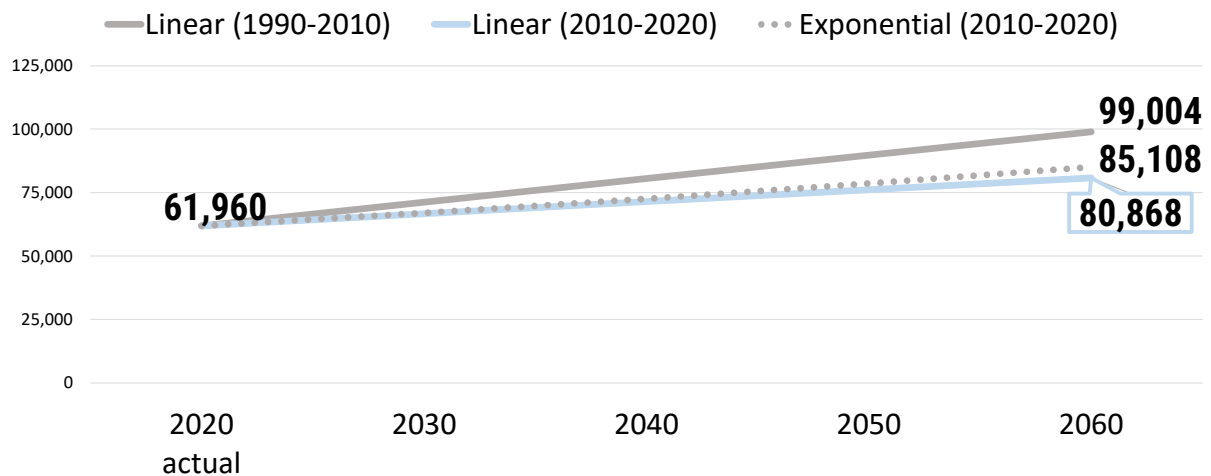
Chatham County Population Projections



Source: Decennial Census; projections by Carolina Demography

69

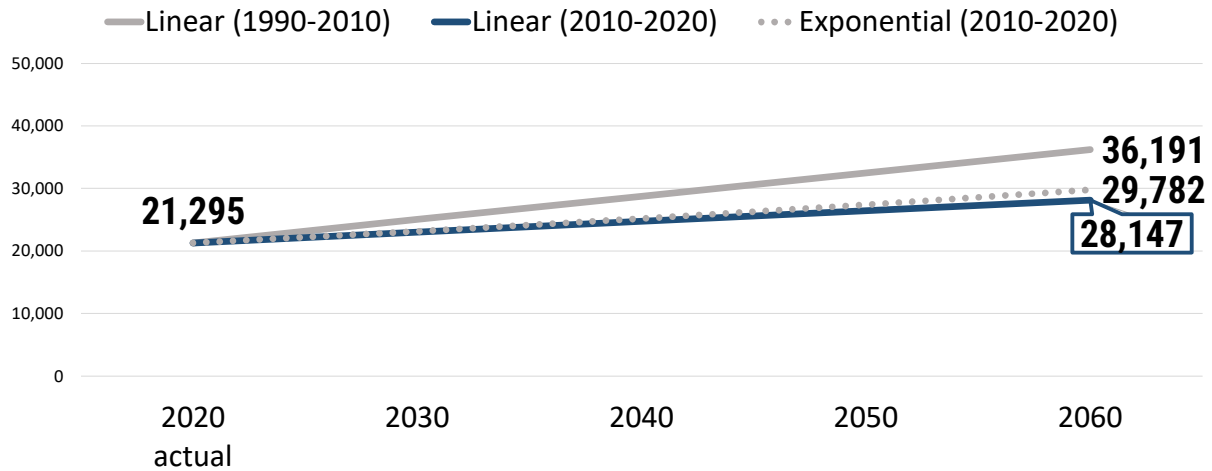
Chapel Hill Population Projections



Source: Decennial Census; projections by Carolina Demography

70

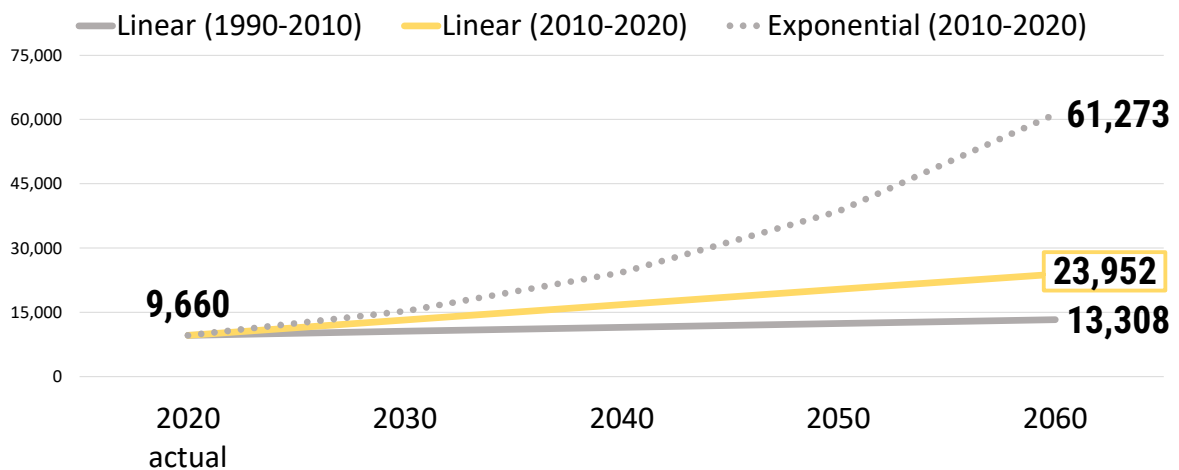
Carrboro Population Projections



Source: Decennial Census; projections by Carolina Demography

71

Hillsborough Population Projections

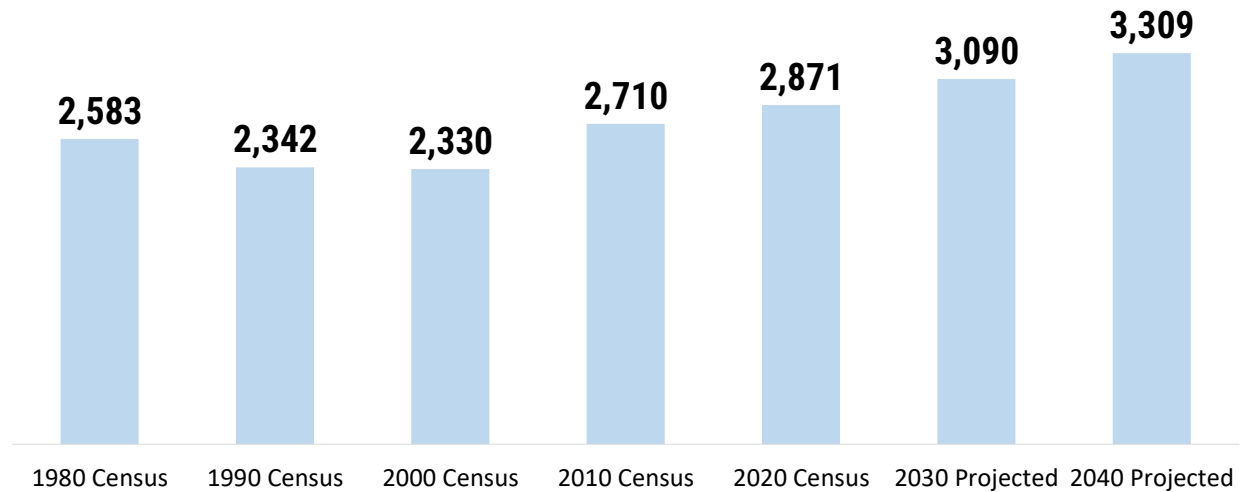


Source: Decennial Census; projections by Carolina Demography

72

Chapel Hill Projected Population Density

Population per square mile, projecting with linear 2010-2020

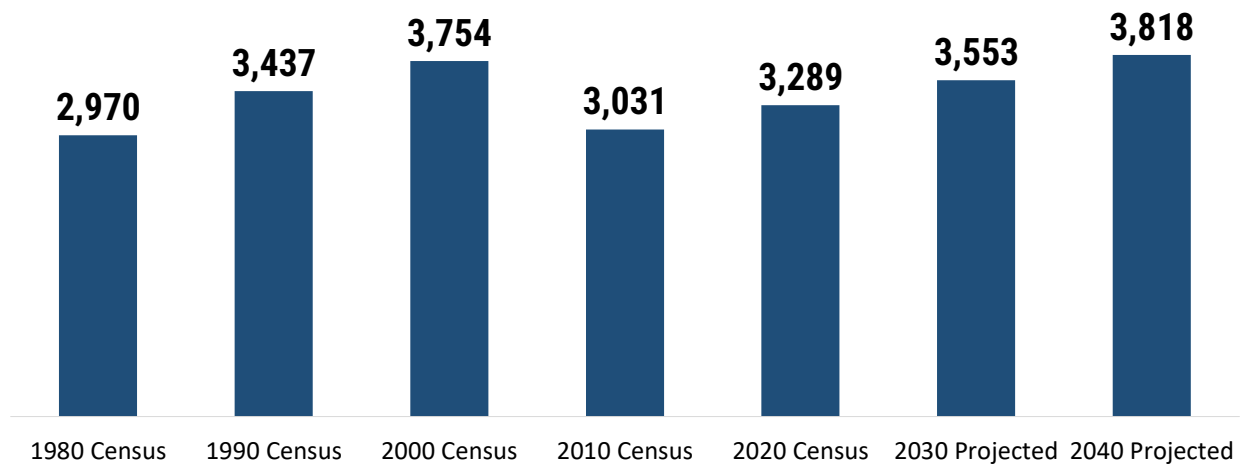


Source: Decennial Census; projections by Carolina Demography

73

Carrboro Projected Population Density

Population per square mile, projecting with linear 2010-2020

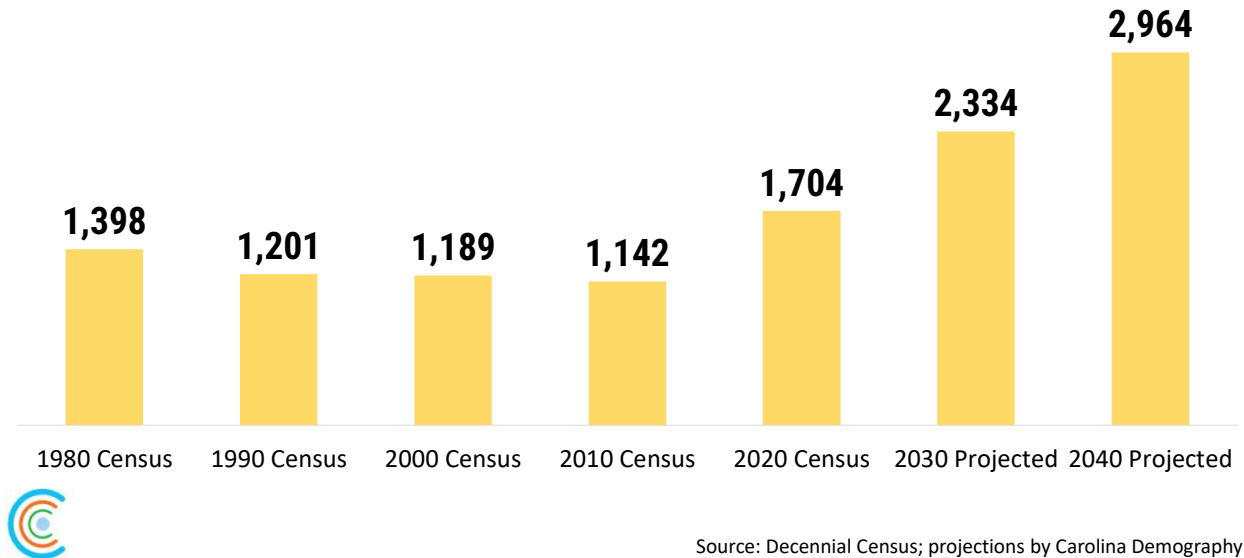


Source: Decennial Census; projections by Carolina Demography

74

Hillsborough Projected Population Density

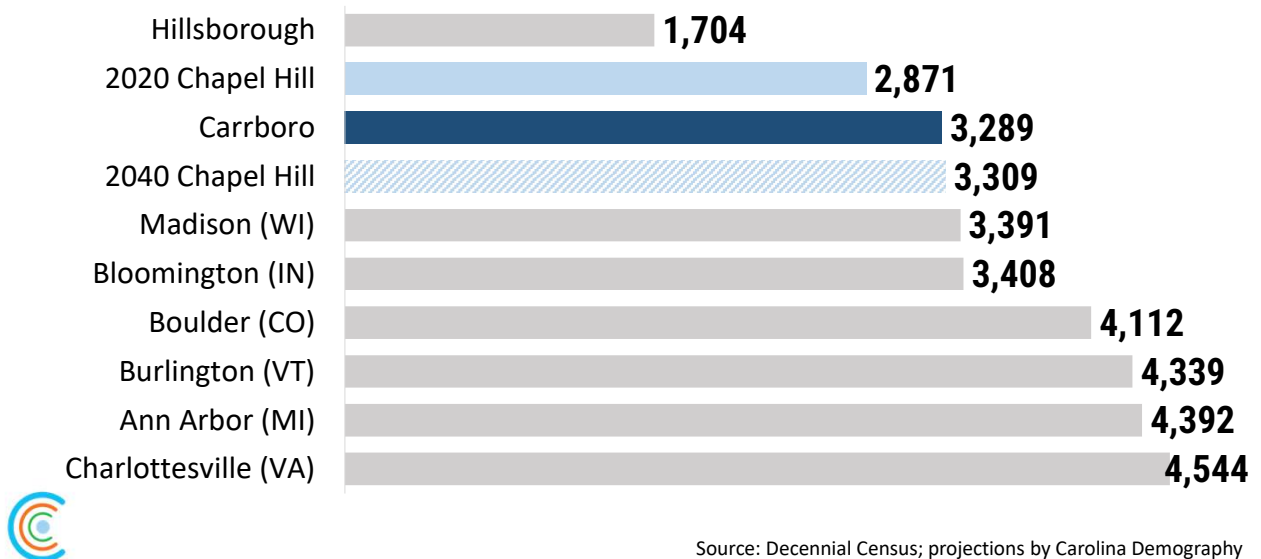
Population per square mile, projecting with linear 2010-2020



75

Chapel Hill Less Dense in 2040 Than Peer College Towns in 2020

Population per square mile, 2020



76

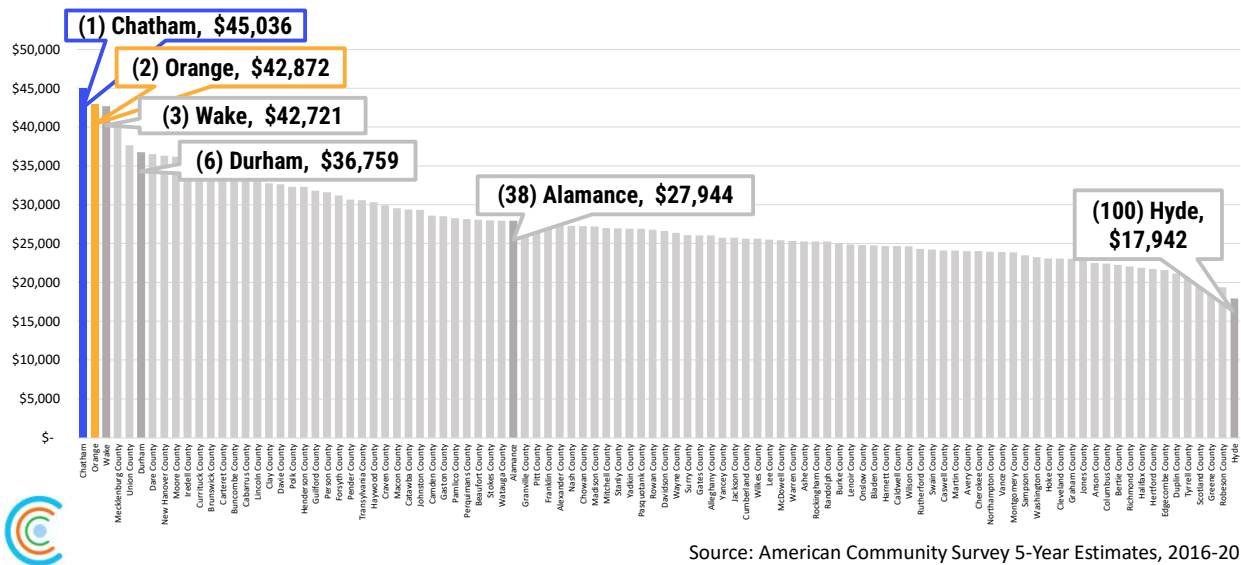
Wages and Income



77

Chatham, Orange Highest Per Capita Income in State

Per Capita Income is the total income earned in an area divided by the total number of the residents in that area

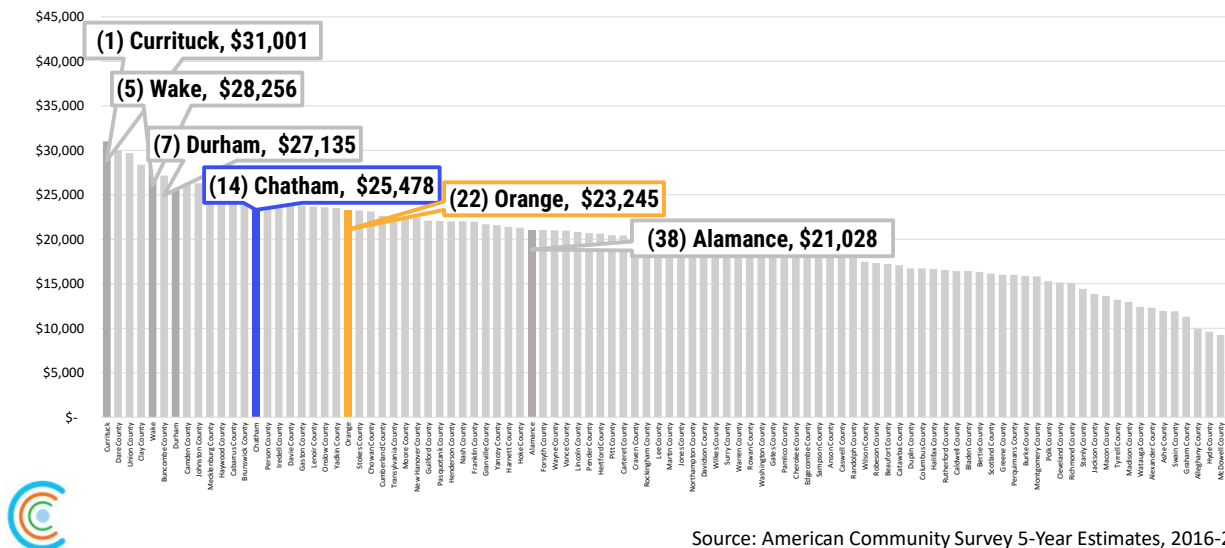


Source: American Community Survey 5-Year Estimates, 2016-20

78

Orange 22nd, Chatham 14th in Black Per Capita Income 2020

Black Per Capita Income is the residents in an area divided by the total number of Black residents in that area

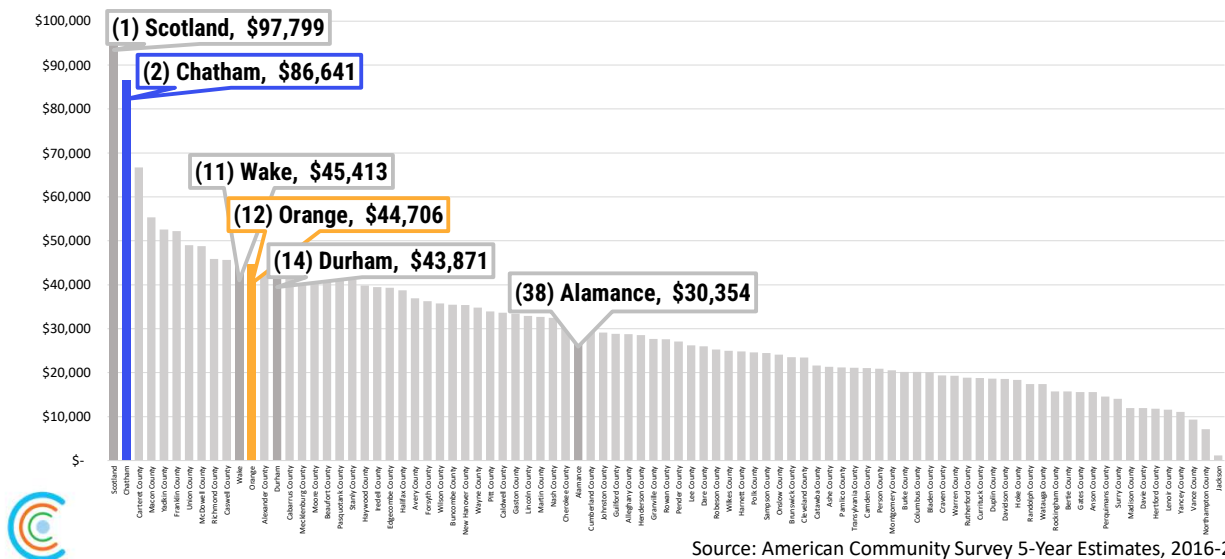


Source: American Community Survey 5-Year Estimates, 2016-20

79

Chatham 2nd, Orange 12th in Asian Per Capita Income

Asian Per Capita Income is the total income earned by Asian residents in an area divided by the total number of Asian residents in that area

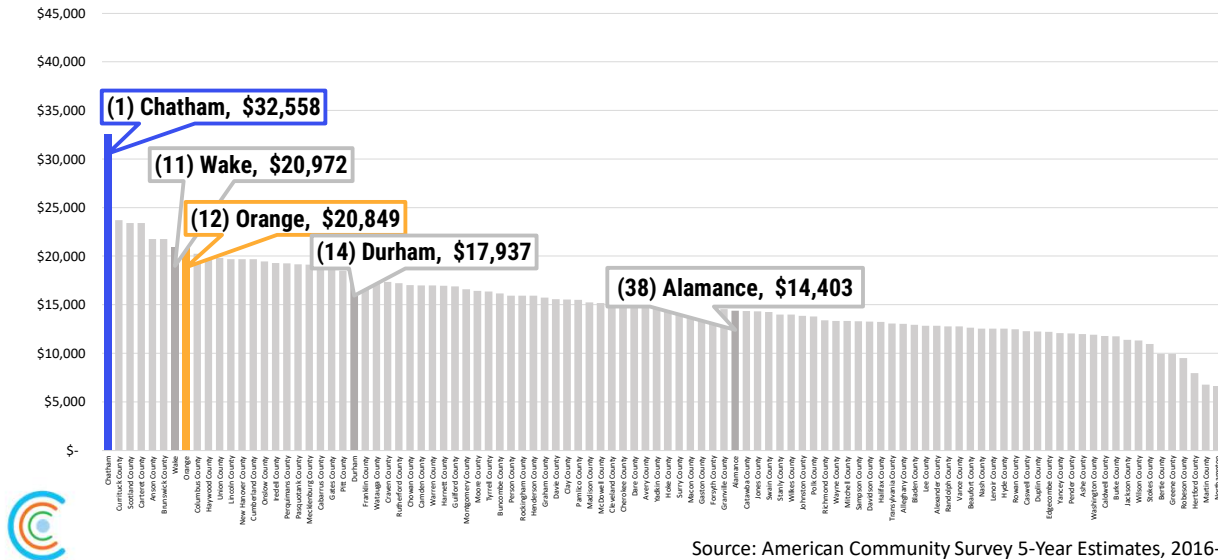


Source: American Community Survey 5-Year Estimates, 2016-20

80

Chatham 1st, Orange 12th in Hispanic Per Capita Income

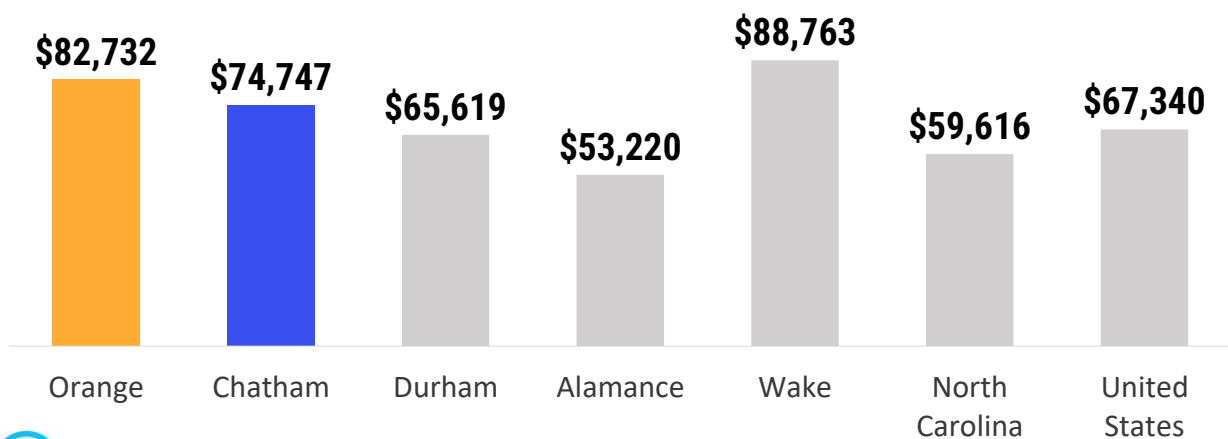
Hispanic Per Capita Income is the total income earned by Hispanic residents in an area divided by the total number of Hispanic residents in that area



81

Regional Median Household Income: Wake 1st; Orange 2nd

Household Income is the total annual earnings of all members of a household, whether they are a family or separate individuals living together (Distinct from Median Family Income and from Per Capita Income)



82

Average AGI: Orange Ranks 1st, Chatham 2nd

Average adjusted gross income (AGI) on all tax returns, by county, 2019

	Average AGI on All Returns	Rank (of 100 Counties)
Orange County	\$105,716	1
Chatham County	\$102,507	2
Wake County	\$93,967	3
Durham County	\$72,507	9
Alamance County	\$55,894	35



Source: IRS

83

AGI for Itemized Returns: Orange Ranks 1st, Chatham 3rd

Average adjusted gross income (AGI) on itemized tax returns, by county, 2019

	Average AGI on Itemized Returns	Rank (of 100 Counties)
Orange County	\$294,505	1
Chatham County	\$261,444	3
Wake County	\$240,133	7
Durham County	\$176,581	32
Alamance County	\$172,456	36



Source: IRS

84

Orange Top Five County in Dollars Given to Charity

Average itemized contribution to charitable causes on itemized tax returns, by county, 2019

	Average Itemized Contributions Reported	Rank (of 100 Counties)
Orange County	\$17,102	5
Wake County	\$12,537	33
Chatham County	\$12,278	42
Durham County	\$10,855	50
Alamance County	\$10,845	70



Source: IRS

85

Percent of AGI Contributed to Charitable Causes: Orange and Chatham Rank Near Bottom

Average percent of adjusted gross income (AGI) contributed to charitable causes on itemized tax returns, by county, 2019

	Percent of AGI Contributed	Rank (of 100 Counties)
Durham County	7%	67
Alamance County	6%	77
Orange County	6%	84
Wake County	5%	93
Chatham County	5%	96



Source: IRS

86

Percent of AGI to Charitable Causes: Residents of Anson County Contribute Highest

NC counties with the highest percent of adjusted gross income (AGI) contributed to charitable causes on itemized tax returns, 2019

	Average Itemized Contribution	% AGI Donated	Rank (of 100 Counties) Percent of AGI Contributed
Anson County	\$11,282	12%	1
Hyde County	\$11,114	11%	2
Hoke County	\$10,592	11%	3
Greene County	\$13,533	11%	4
Cherokee County	\$14,577	11%	5



Source: IRS

87

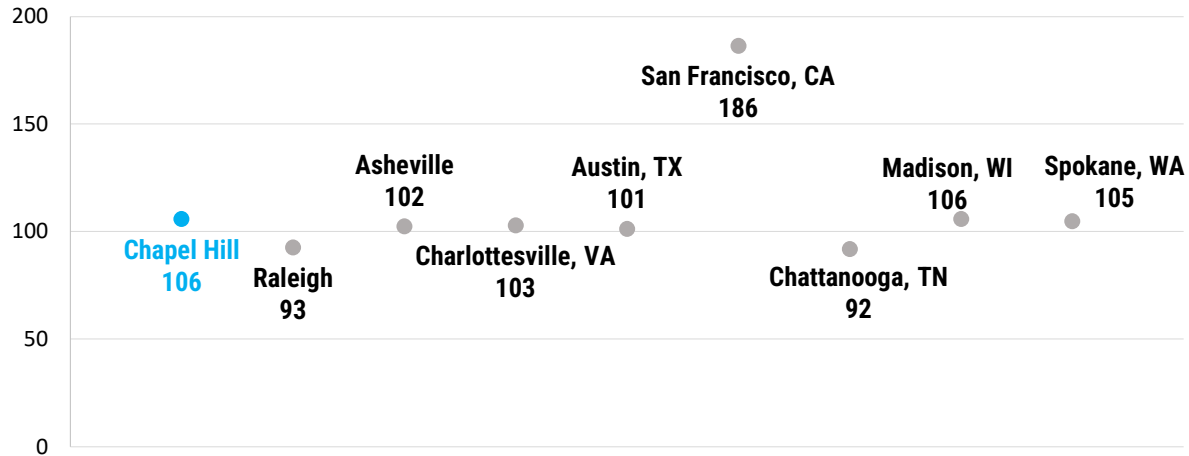
Cost of Living



88

2021 Q3 Cost of Living: Composite Index

(100 = national average)

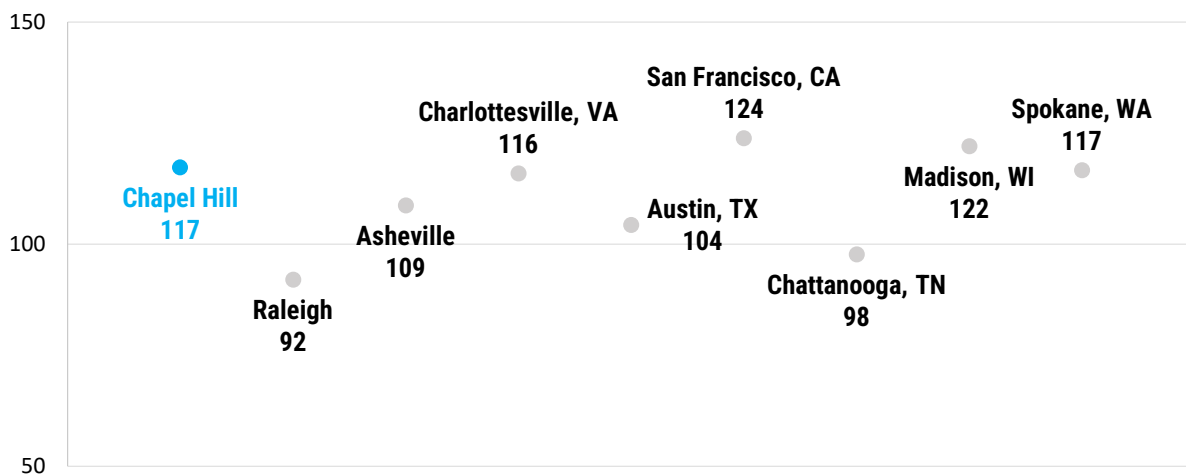


Source: C2ER (Council for Community and Economic Research), Q3 2021

89

2021 Q3 Cost of Living: Healthcare Index

(100 = national average)

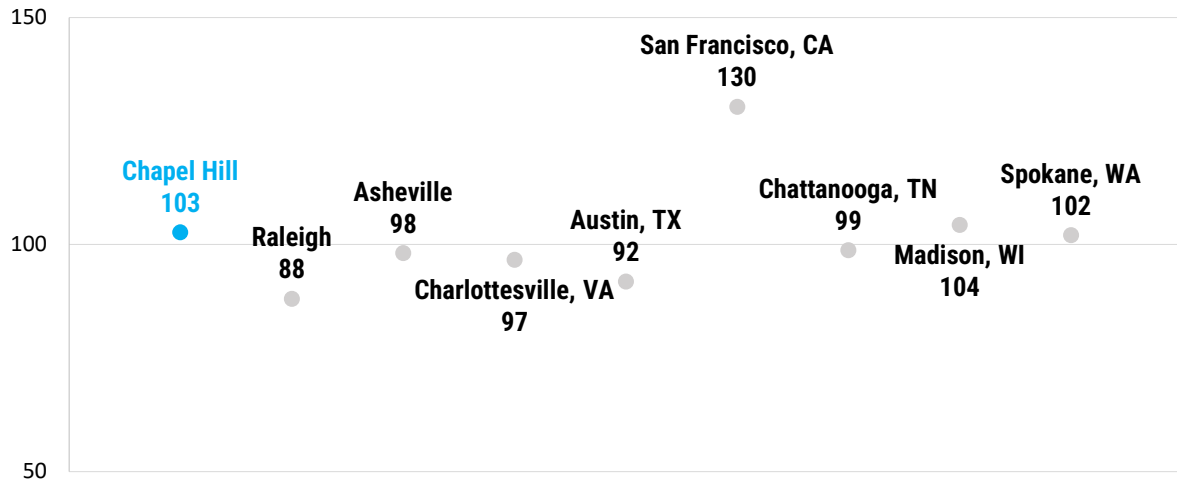


Source: C2ER (Council for Community and Economic Research), Q3 2021

90

2021 Q3 Cost of Living: Grocery Index

(100 = national average)

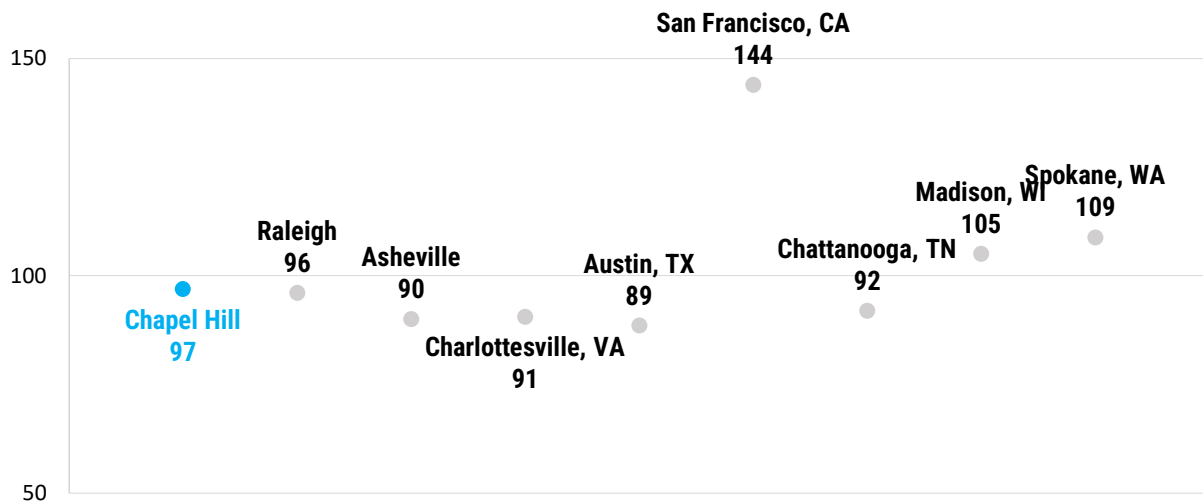


Source: C2ER (Council for Community and Economic Research), Q3 2021

91

2021 Q3 Cost of Living: Transportation Index

(100 = national average)

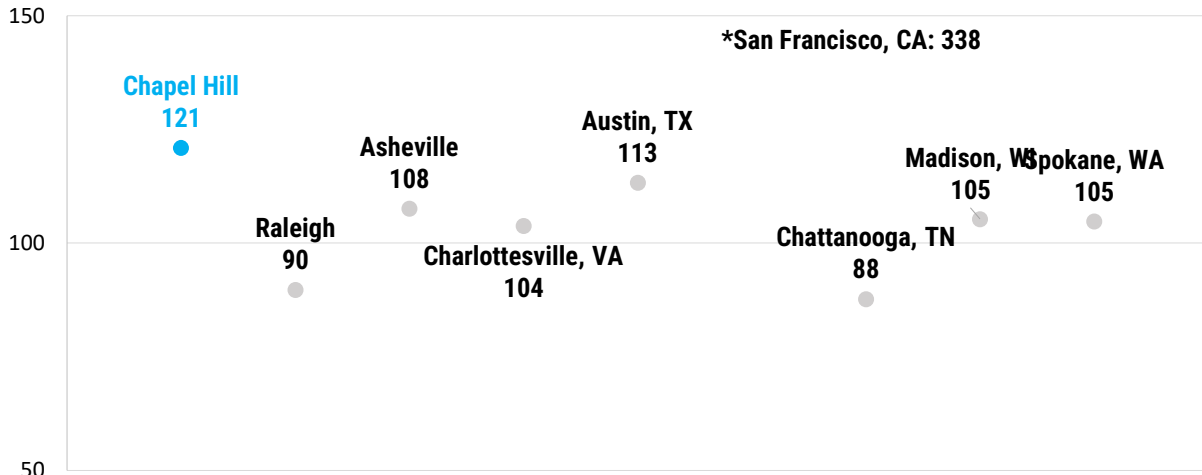


Source: C2ER (Council for Community and Economic Research), Q3 2021

92

Cost of Living: Housing Index

(100 = national average)



Source: C2ER (Council for Community and Economic Research), Q3 2021

93

Employers, Employment, and Labor Force



94

Orange County Top Employers and Industries



95

Orange County Top 25 Employers, 2021

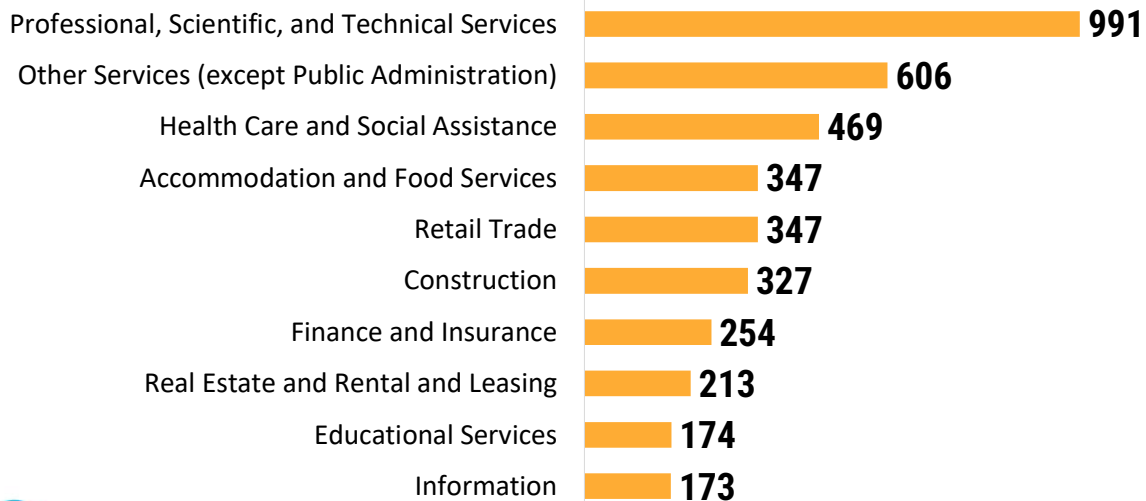
- | | |
|---------------------------------------|---|
| 1. UNC Chapel Hill | 14. Summit Design & Engineering Service |
| 2. UNC Health Care System | 15. Carol Woods Retirement Community |
| 3. Chapel Hill-Carrboro City Schools | 16. Food Lion |
| 4. Orange County Schools | 17. United Parcel Service |
| 5. Orange County Government | 18. Wellspring Grocery (<i>Whole Foods</i>) |
| 6. Industrial Connections & Solutions | 19. Weaver Street Market |
| 7. Eurosport | 20. Wegman's |
| 8. Town Of Chapel Hill | 21. Westrock Services LLC |
| 9. Wal-Mart | 22. Noom Inc. |
| 10. Armacell | 23. Residential Services |
| 11. Harris Teeter | 24. Aramark |
| 12. AKG Of America | 25. Hyatt Corporation |
| 13. PHE Inc | |



Source: NC Department of Commerce and Orange County Economic Development

96

Top 10 Orange County Industries by Number of Enterprises Organized by NAICS code, 2021



Source: Quarterly Census of Employment and Wages (QCEW) via NC Department of Commerce

97

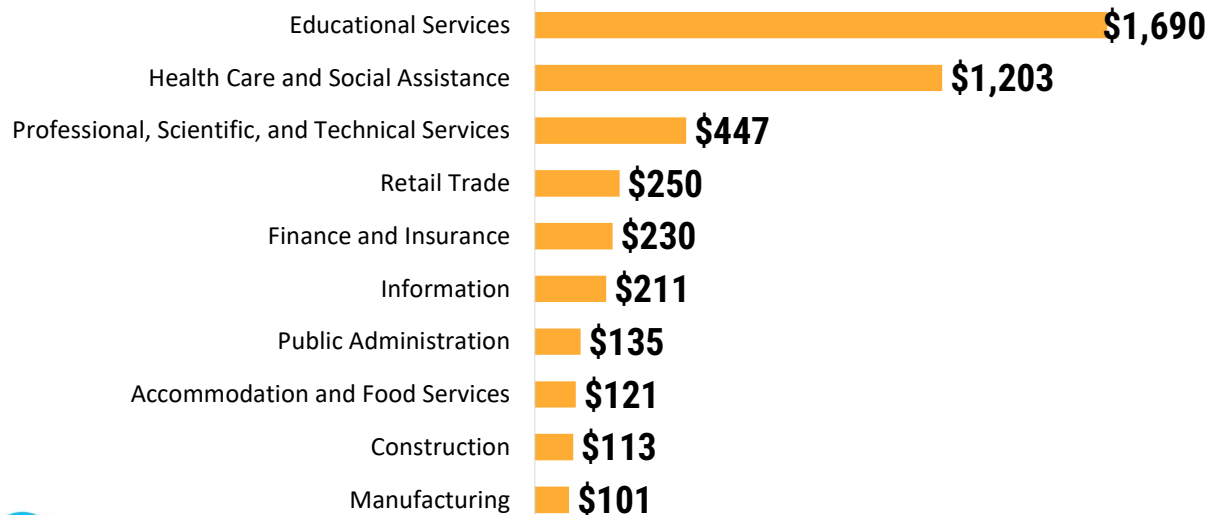
Top 10 Orange County Industries by Average Employment Organized by NAICS code, 2021



Source: Quarterly Census of Employment and Wages (QCEW) via NC Department of Commerce

98

Top 10 Orange County Industries by Total Wages (in millions) Organized by NAICS code, 2021



Source: Quarterly Census of Employment and Wages (QCEW) via NC Department of Commerce

99

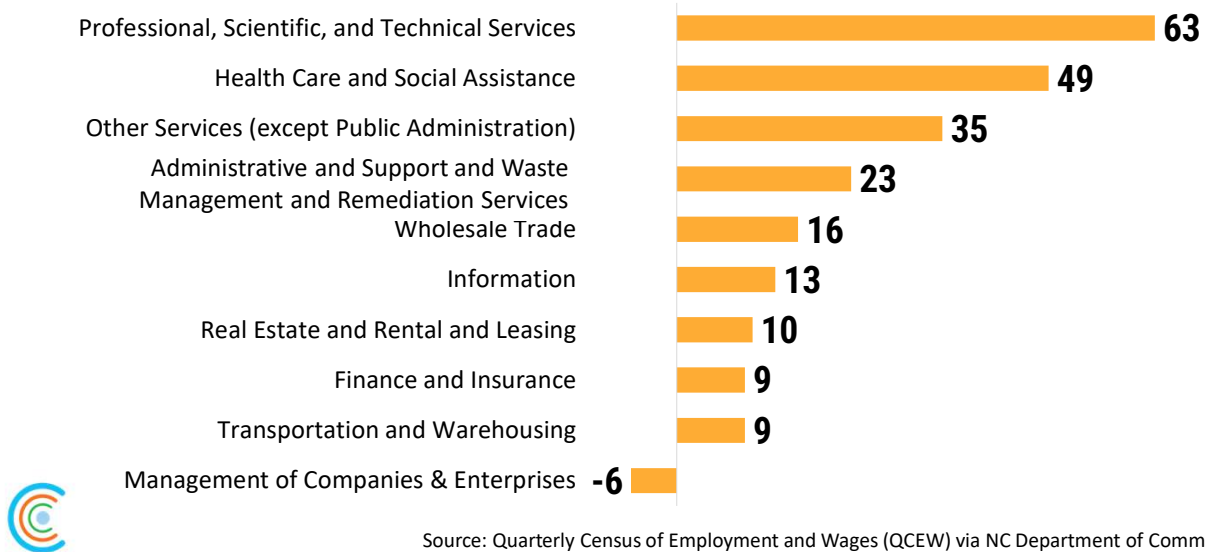
Orange County Industry Segment Change 2020 to 2022



100

Change in Number of Enterprises by Sector from 2020 to 2021

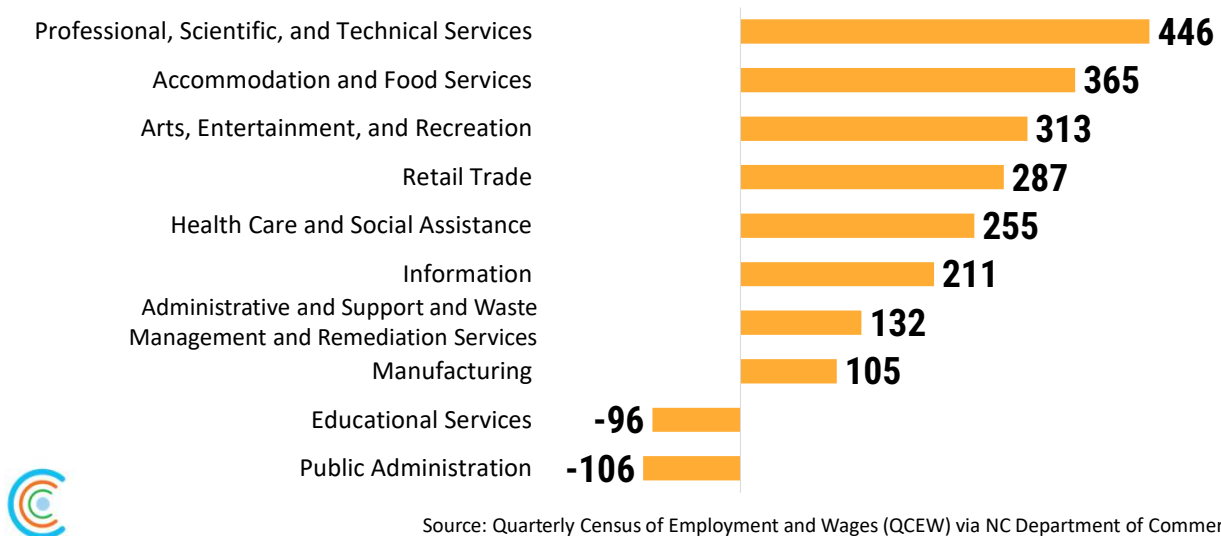
Industry segments with largest gains and losses in number of enterprises; organized by NAICS code, 2021



101

Change in Number of Jobs by Sector from 2020 to 2021

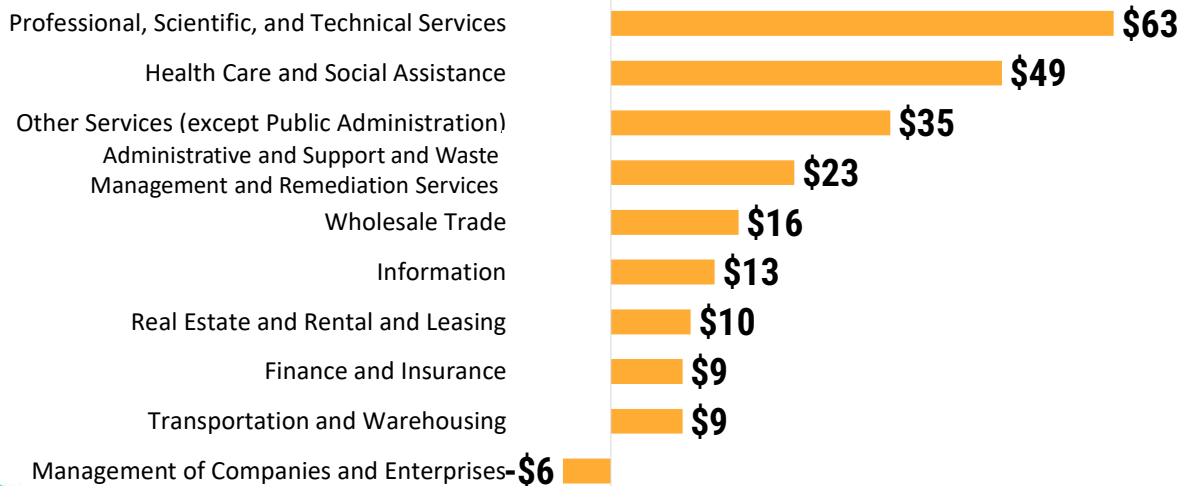
Top Industry Segments that saw the largest gains and losses in Annual Average Employment from 2020 to 2021, organized by NAICS code



102

Change in Gross Wages Paid by Sector from 2020 to 2021

Industry segments with largest gains and losses in Total Annual Wages (\$millions) from 2020 to 2021, organized by NAICS code



Source: Quarterly Census of Employment and Wages (QCEW) via NC Department of Commerce

103

Chatham County Top Employers and Industries



104

Chatham County Top 25 Employers, 2021

- | | |
|--|---|
| 1. Chatham County Schools | 14. Harris Teeter |
| 2. Chatham County Government | 15. The Laurels Of Chatham |
| 3. Carolina Meadows | 16. Brookwood Farms |
| 4. Mountaire Farms Of NC | 17. Aegis Home Care |
| 5. Galloway Ridge | 18. Southern Veneer Specialty Products |
| 6. Wal-Mart | 19. Governors Club |
| 7. Flakeboard America Limited | 20. Mas Acme USA |
| 8. NFI Interactive Logistics Inc | 21. Packers Sanitation Services |
| 9. UNC Health Care System | 22. Town & Country Hardware Stores |
| 10. Piedmont Health Services | 23. EPC Siler City |
| 11. Charter Furniture | 24. Food Lion |
| 12. Fitch Creations (<i>Fearrington</i>) | 25. Genesis Administrative Services LLC |
| 13. Lowes Home Centers | |



Source: NC Department of Commerce

105

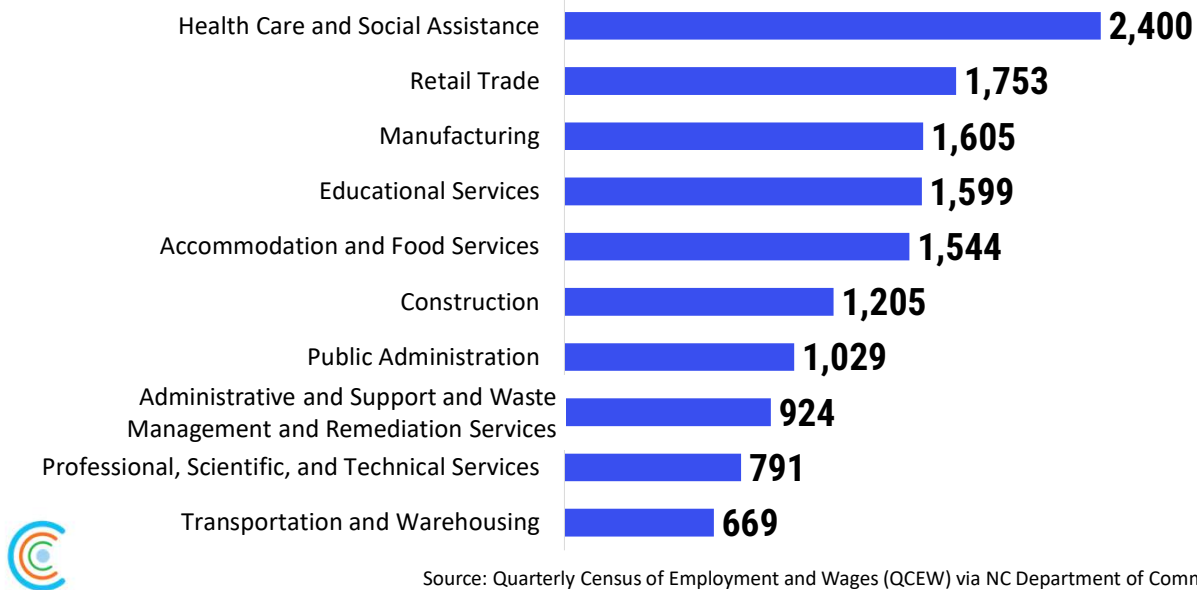
Top 10 Chatham County Industries by Number of Enterprises Organized by NAICS code, 2021



Source: Quarterly Census of Employment and Wages (QCEW) via NC Department of Commerce

106

Top 10 Chatham County Industries by Average Employment Organized by NAICS code, 2021



107

Top 10 Chatham County Industries by Total Wages (in millions) Organized by NAICS code, 2021



108

Orange County Employer Firms

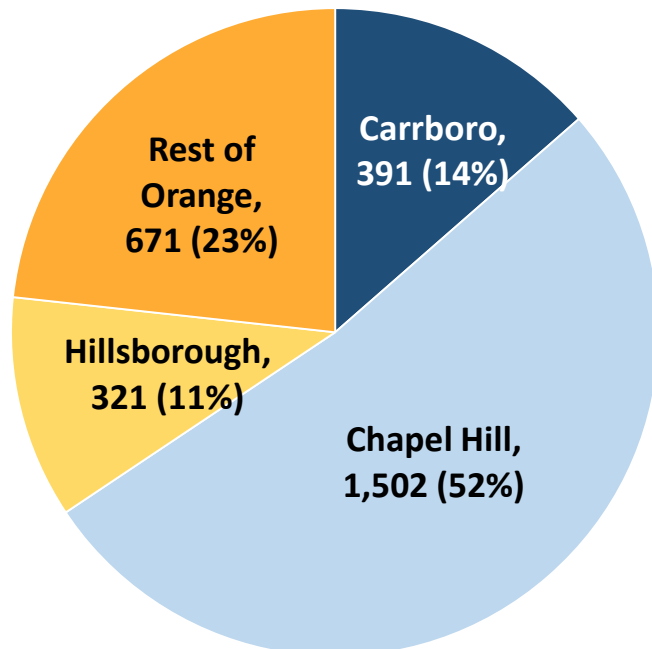
(Firms with Employees)



109

Estimated Number of Orange County Employer Firms

Total = 2,885

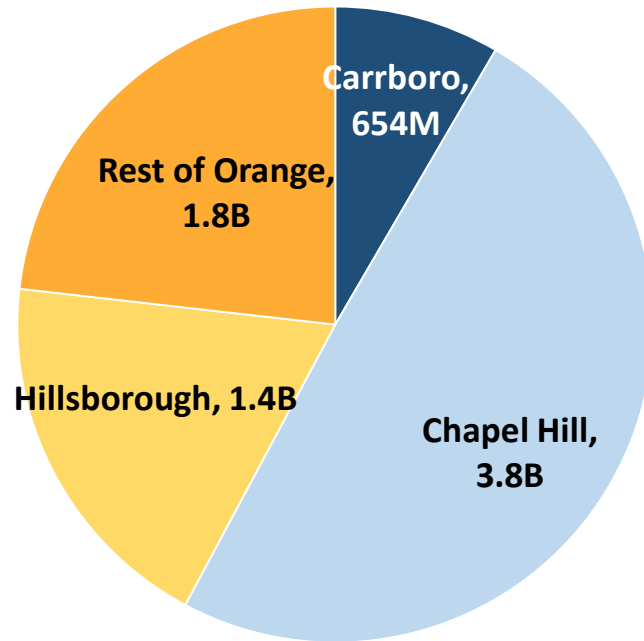


Source: Census Bureau, 2017 Business Survey

110

Estimated Sales, Value of Shipments, or Revenue of Orange County Employer Firms

Total = \$7.77 billion

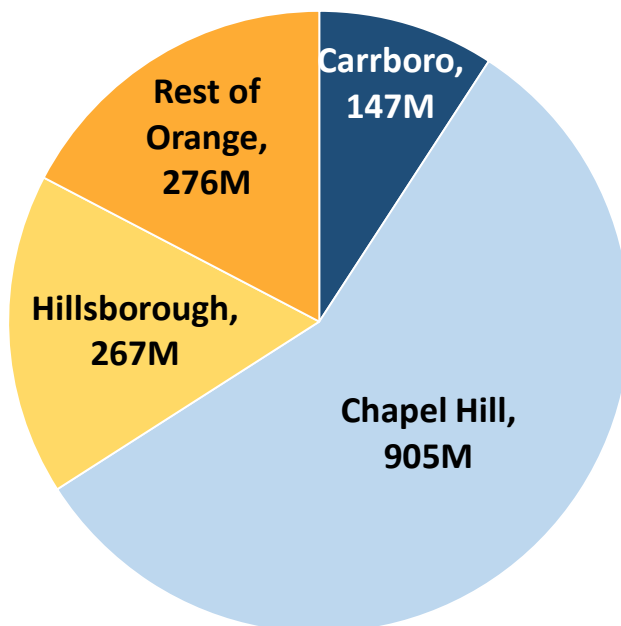


Source: Census Bureau, 2017 Business Survey

111

Estimated Annual Payroll of Orange County Employer Firms (in \$millions)

Total = \$1.594 billion

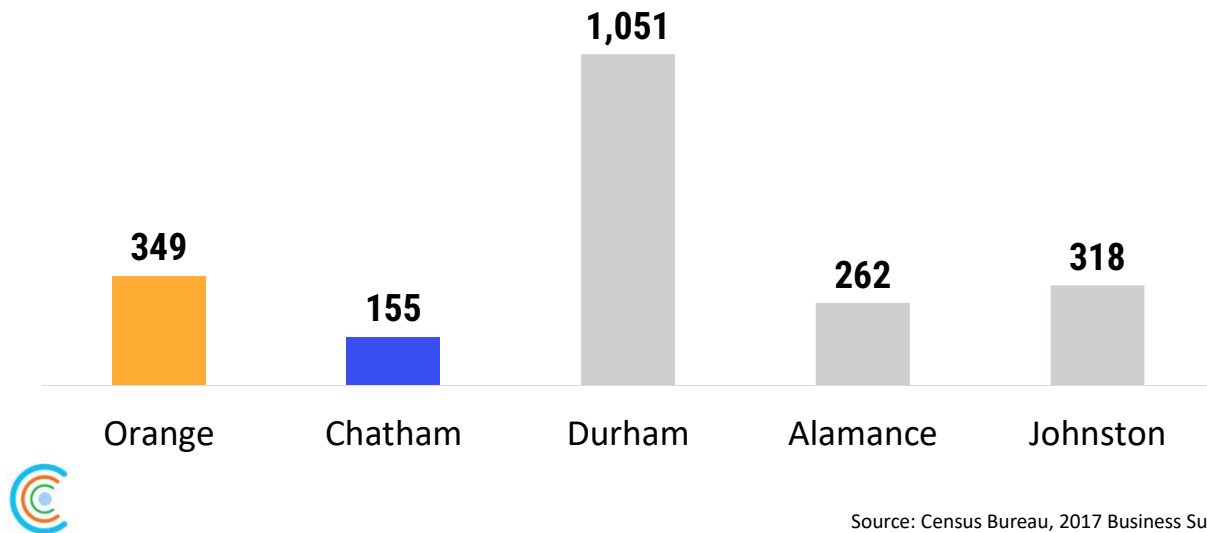


Source: Census Bureau, 2017 Business Survey

112

Estimated Minority-Owned Employer Firms

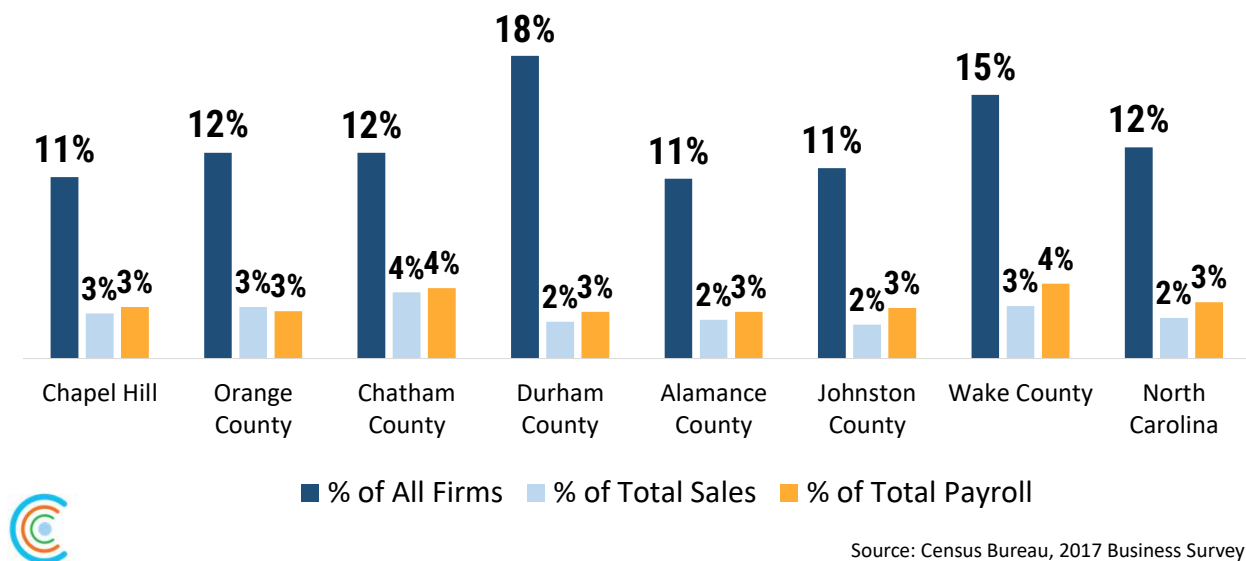
Estimated number of minority-owned firms with employees by county



113

Minority-Owned Employers Make Up 11-18% of All Firms

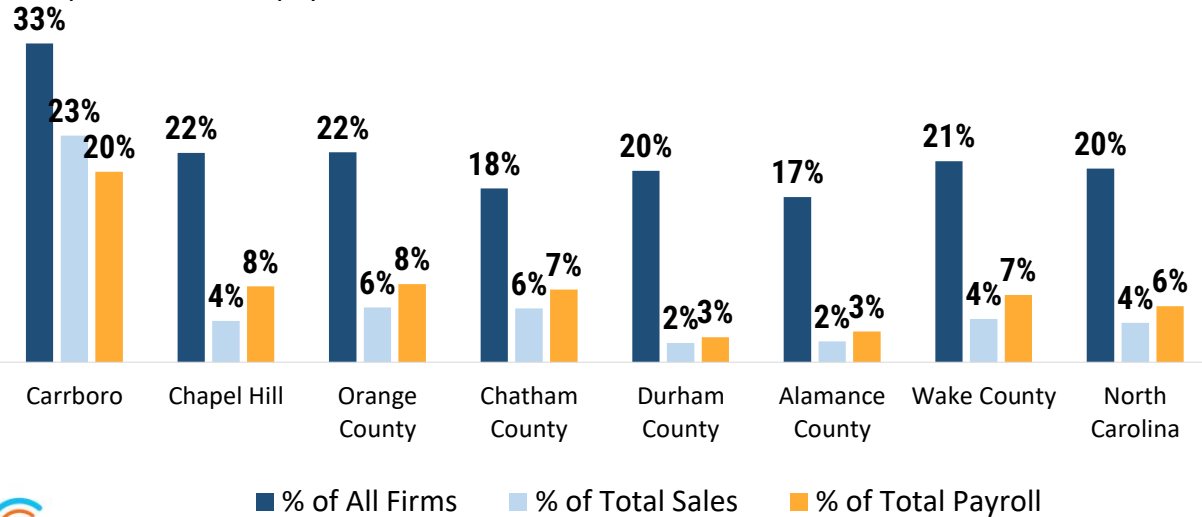
Estimated minority-owned employer firms as percent of all firms, percent of total sales, and percent of total payroll



114

33% of Carrboro Firms are Women-Owned

Estimated women-owned employer firms as percent of all firms, percent of total sales, and percent of total payroll



Source: Census Bureau, 2017 Business Survey

115

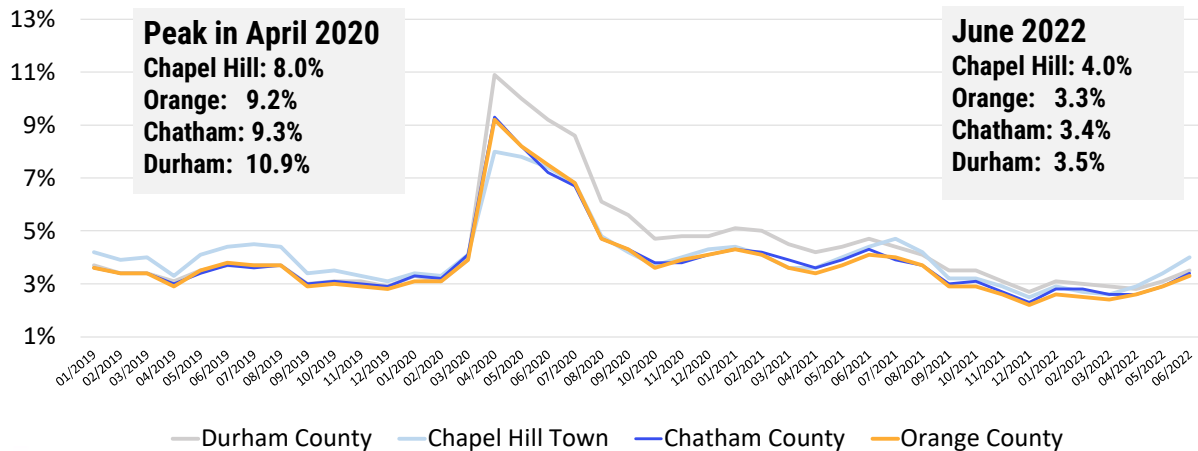
Unemployment and Labor Force



116

Unemployment Declines from April 2020 Peak

Monthly unemployment rate (unadjusted), 1/2019-6/2022

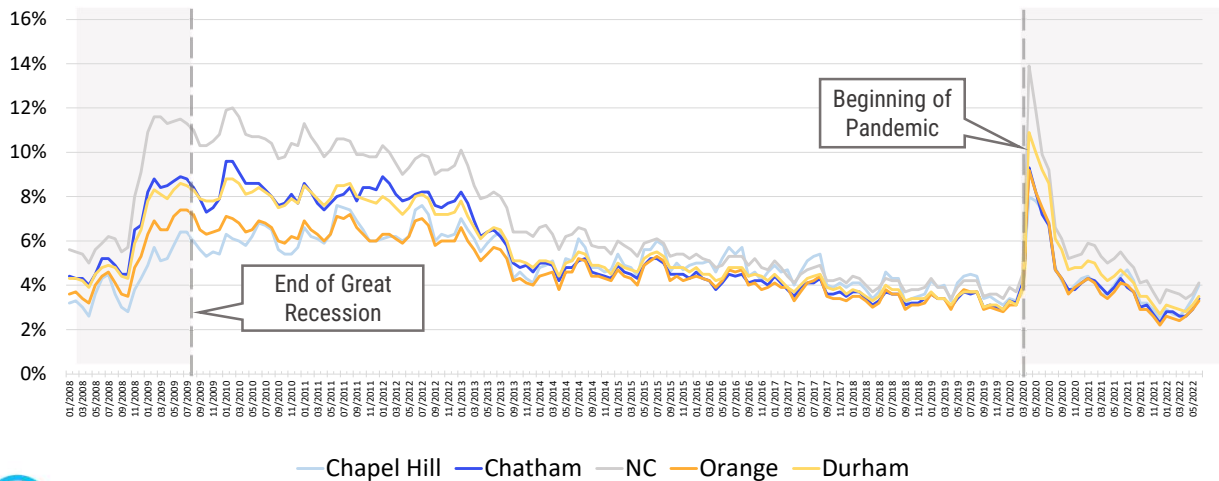


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

117

Pandemic Leads to Larger Spike in Unemployment, With Faster Recovery than Great Recession

Monthly unemployment rate (unadjusted), 1/2008 – 6/2022

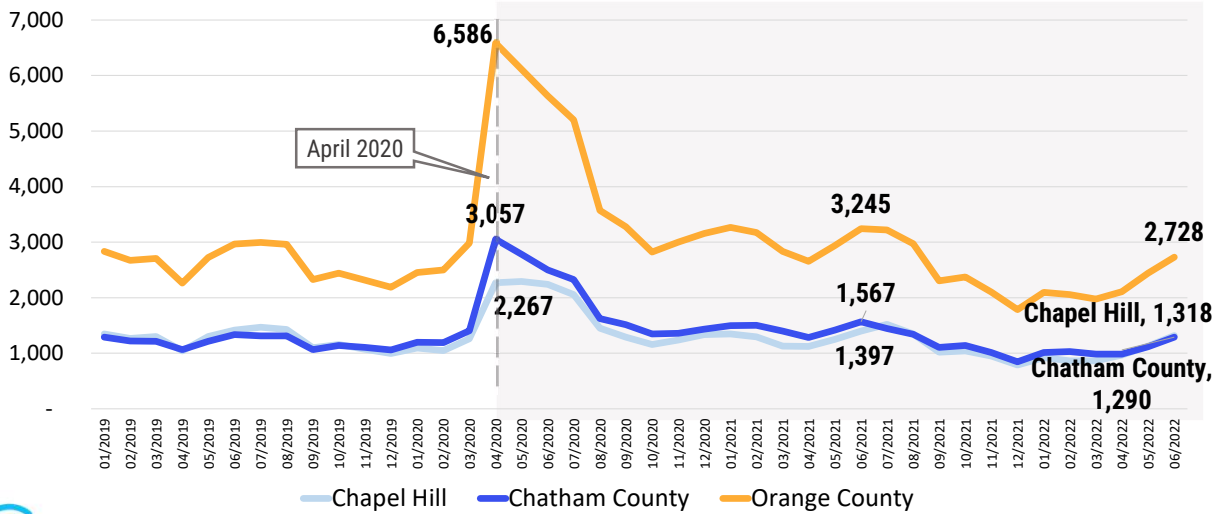


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

118

Unemployment Returns to Pre-Pandemic Levels

Monthly unemployed individuals, 1/2019 – 6/2022

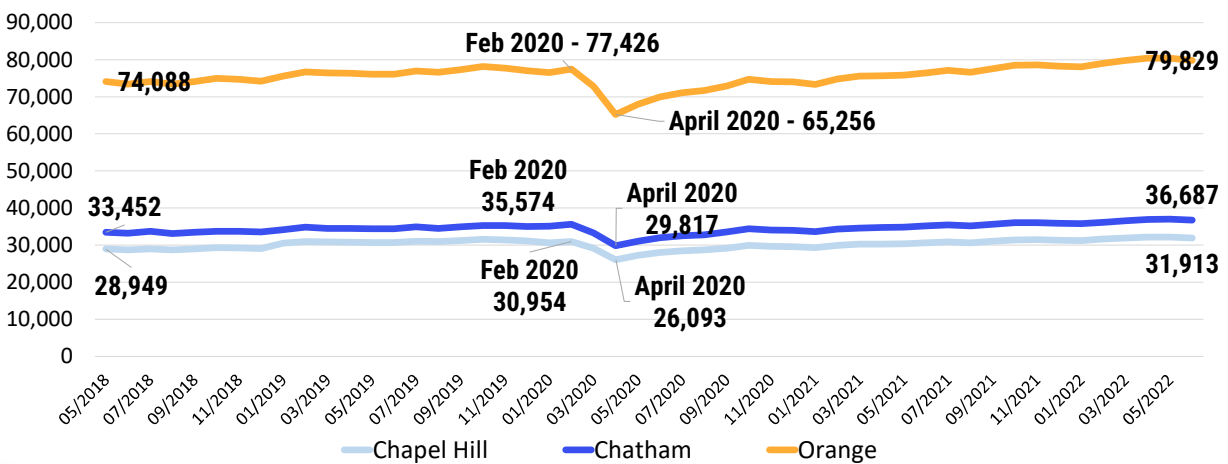


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

119

Local Employment Drops in Q2 2020, Recovers and Sets New Employment Records in Q4 2021

Monthly employed individuals, 5/2018 – 5/2022

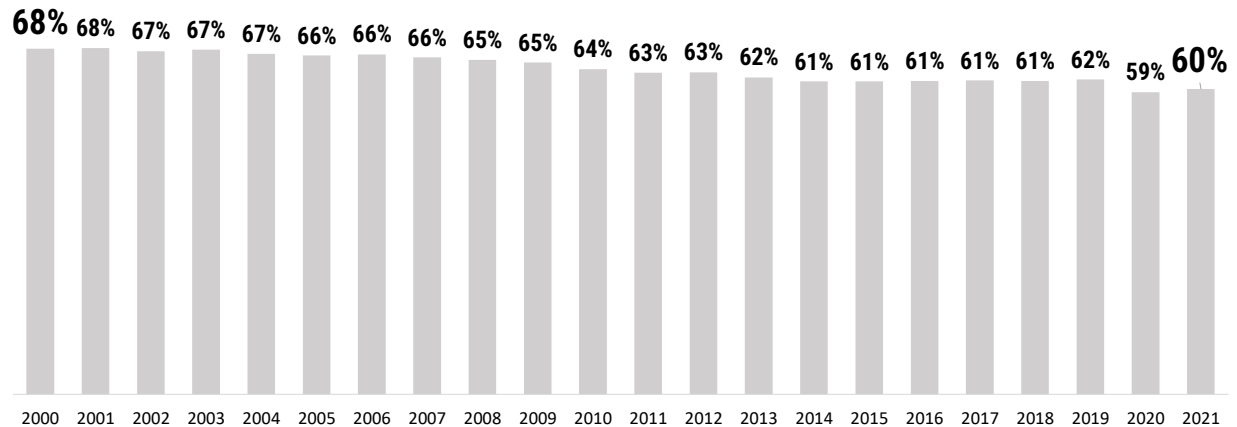


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

120

North Carolina Workforce Participation Rate Steadily Declining Since 2000, Holds at 60% for 2021

Percentage of adults (ages 18-65) who are either working or actively seeking a job if unemployed (2000 to 2021)



Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

121

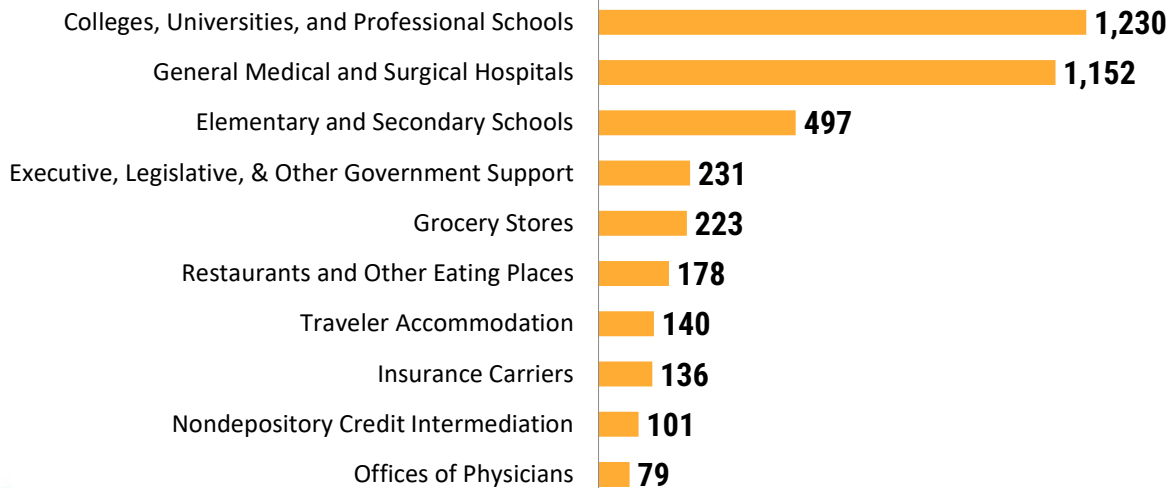
Available Jobs



122

Top Orange County Industries With Active Job Listings

Top Orange County industries by number of active job postings, July 30, 2022 – Aug 28, 2022

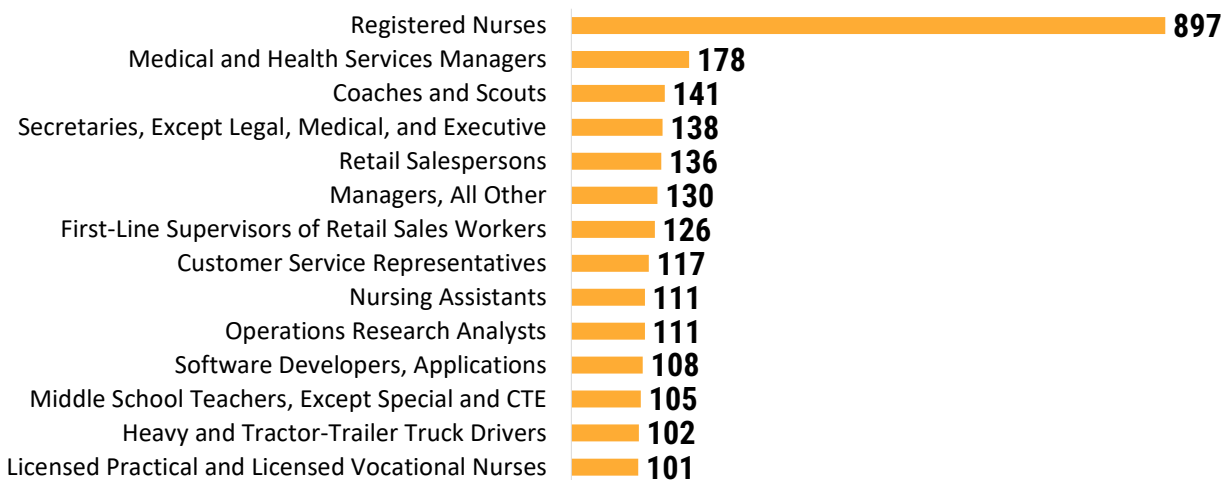


Source: Labor Insight

123

897 Registered Nursing Positions Open in Orange

Orange County's most in-demand positions by number of active job postings, July 30, 2022 – Aug 28, 2022

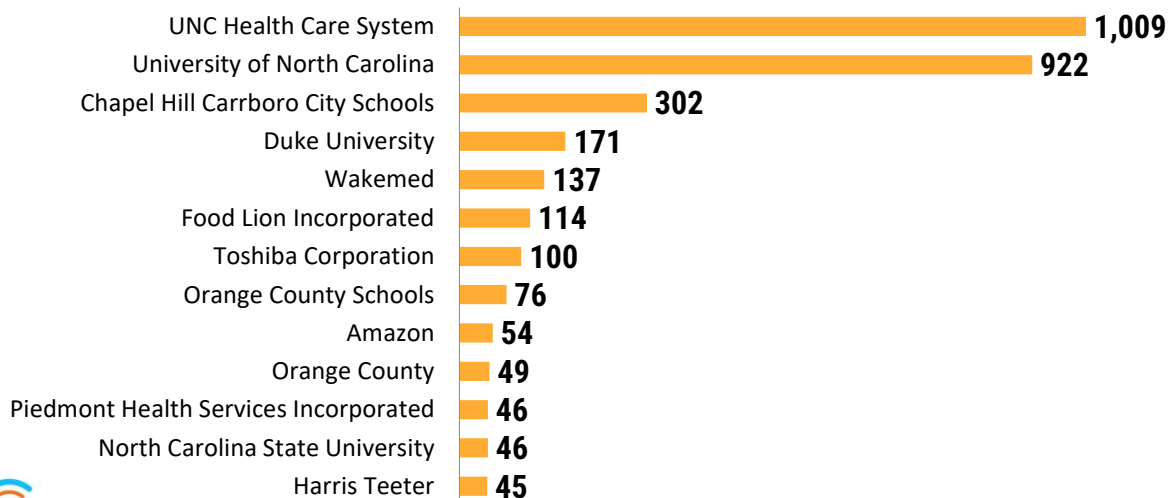


Source: Labor Insight

124

UNC and UNC Health Have 1,931 Openings in Orange

Orange County employers with the most job openings by number of active job postings,
July 30, 2022 – Aug 28, 2022

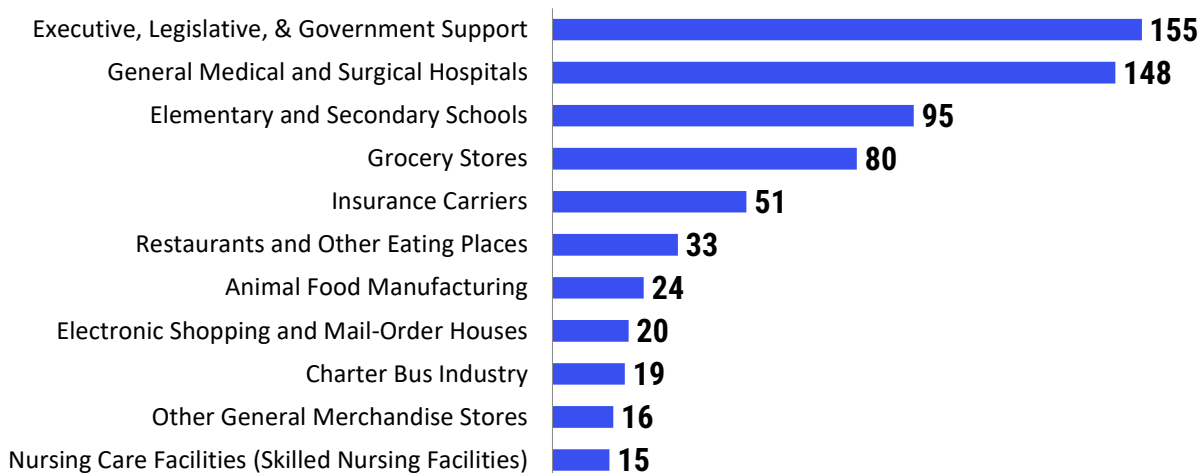


Source: Labor Insight

125

Government and Health Lead Open Positions in Chatham

Top Chatham County industries by number of active job postings,
July 30, 2022 – Aug 28, 2022

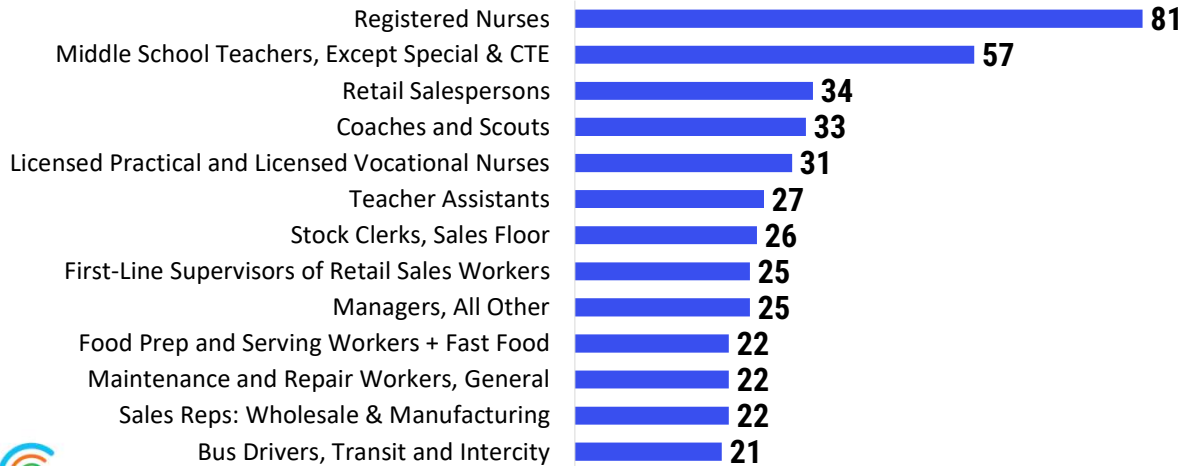


Source: Labor Insight

126

Registered Nurses, Teachers, and Retail Sales Top Open Positions in Chatham County

Chatham County's most in-demand positions by number of active job postings, July 30, 2022 – Aug 28, 2022

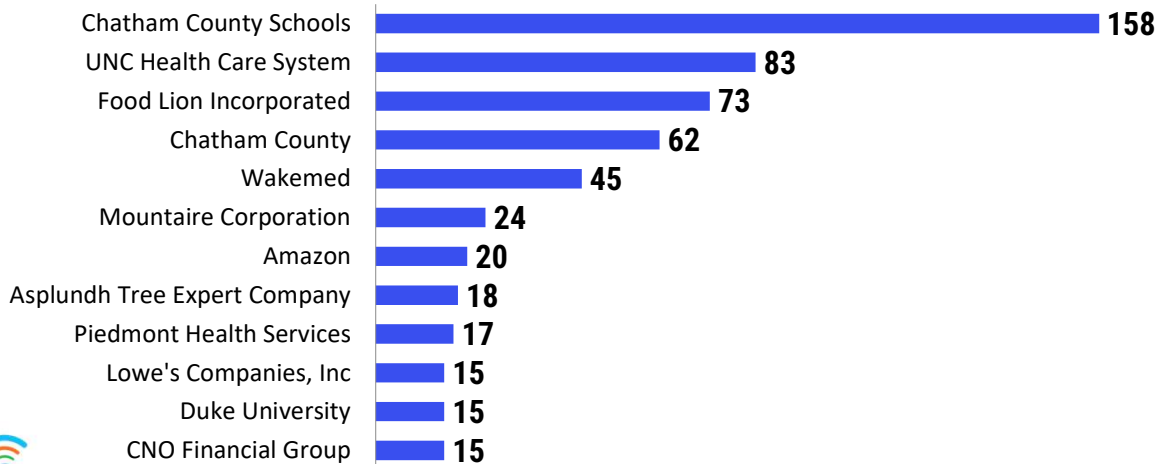


Source: Labor Insight

127

Chatham Schools and UNC Health Combine for 240 Current Open Positions in Chatham

Chatham County employers with the most job openings by number of active job postings July 30, 2022 – Aug 28, 2022



Source: Labor Insight

128

Young Workers



129

Total Number of Young Workers Working in Orange County Still Up From 2012 Low

Number of workers (29 and younger) working in Orange County, 2002 to 2019

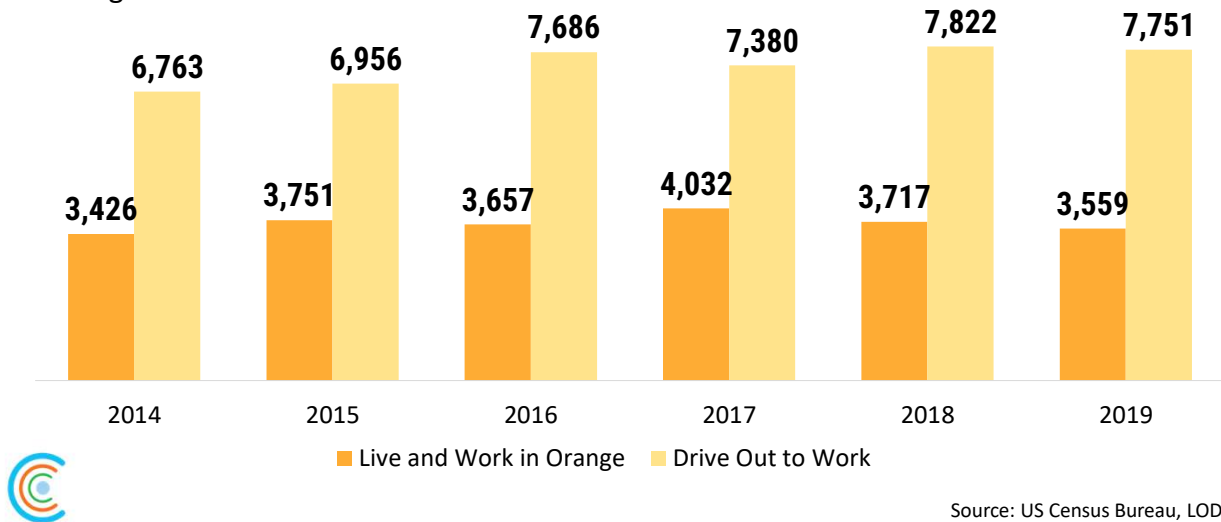


Source: US Census Bureau, LODES

130

Number of Young Workers Living and Working in Orange Down from 2017 High

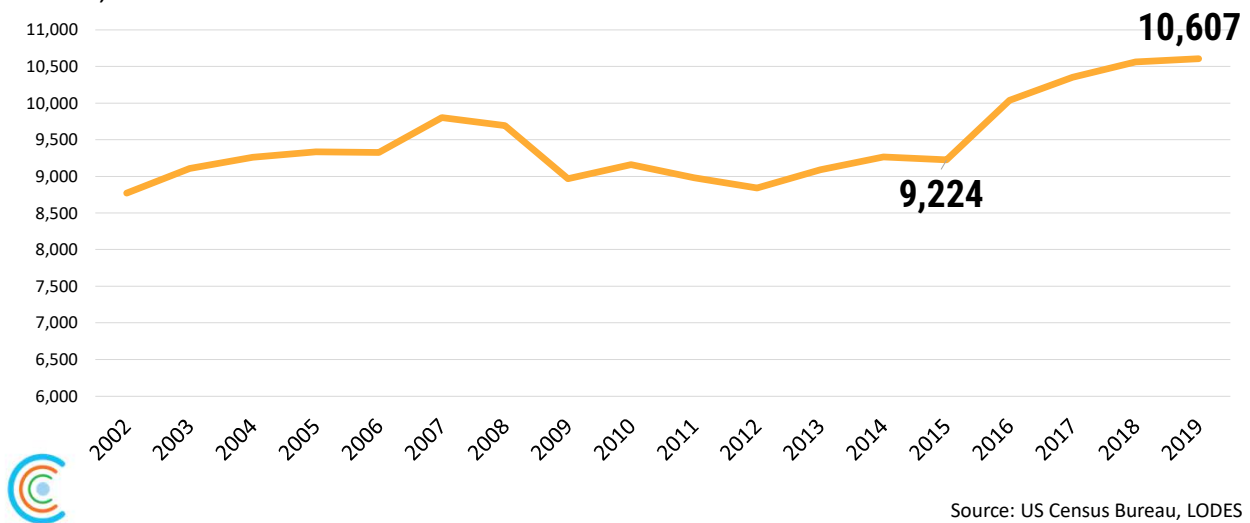
Number of Orange County young workers (29 and younger) living and working; living and driving out to work



131

Young Workers Driving into Orange County for Work at All Time High

Young workers (29 and younger) living in another county driving into Orange County for work, 2002 to 2019



132

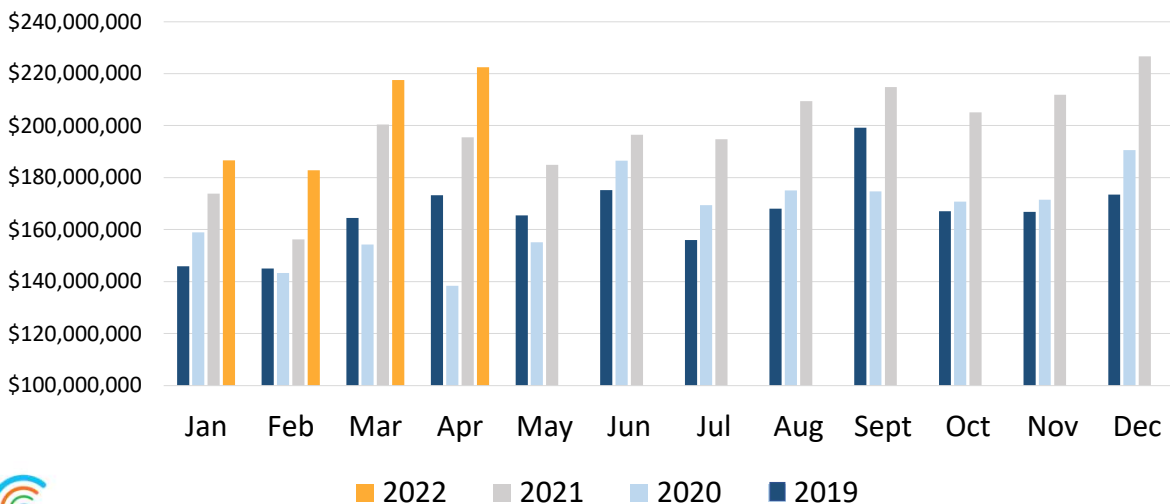
Retail Sales and Sales Tax Revenue



133

Orange County Retail Sales Decline in 2020, Rebound in 2021, and Continue to Grow in 2022

Taxable retail sales by month, 2019 through April 2022

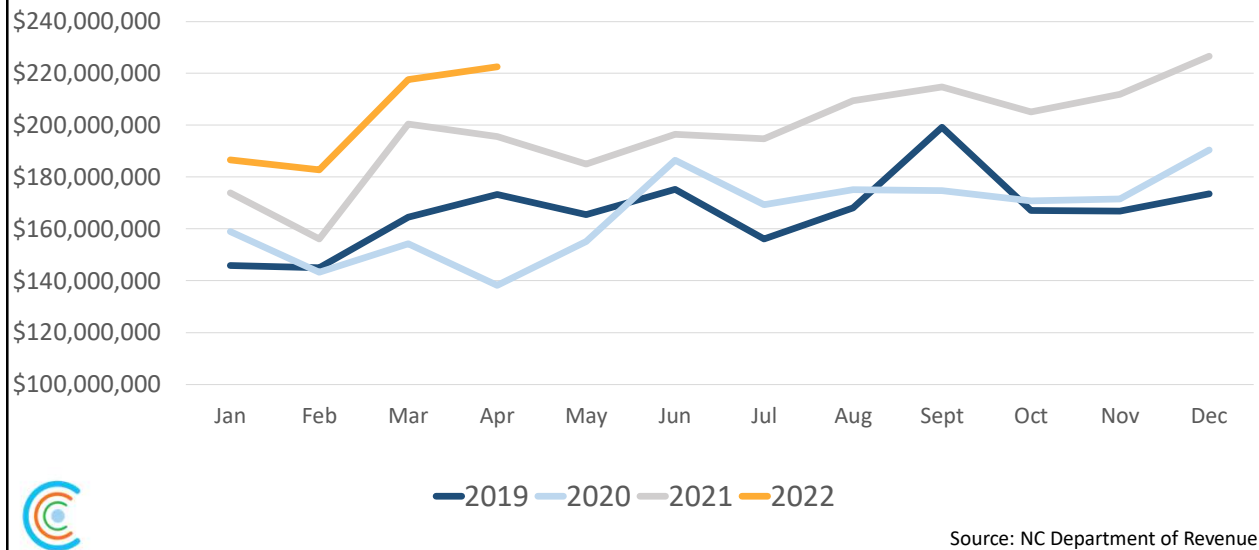


Source: NC Department of Revenue

134

Orange County's 2022 Monthly Retail Sales Outpace All Previous Years

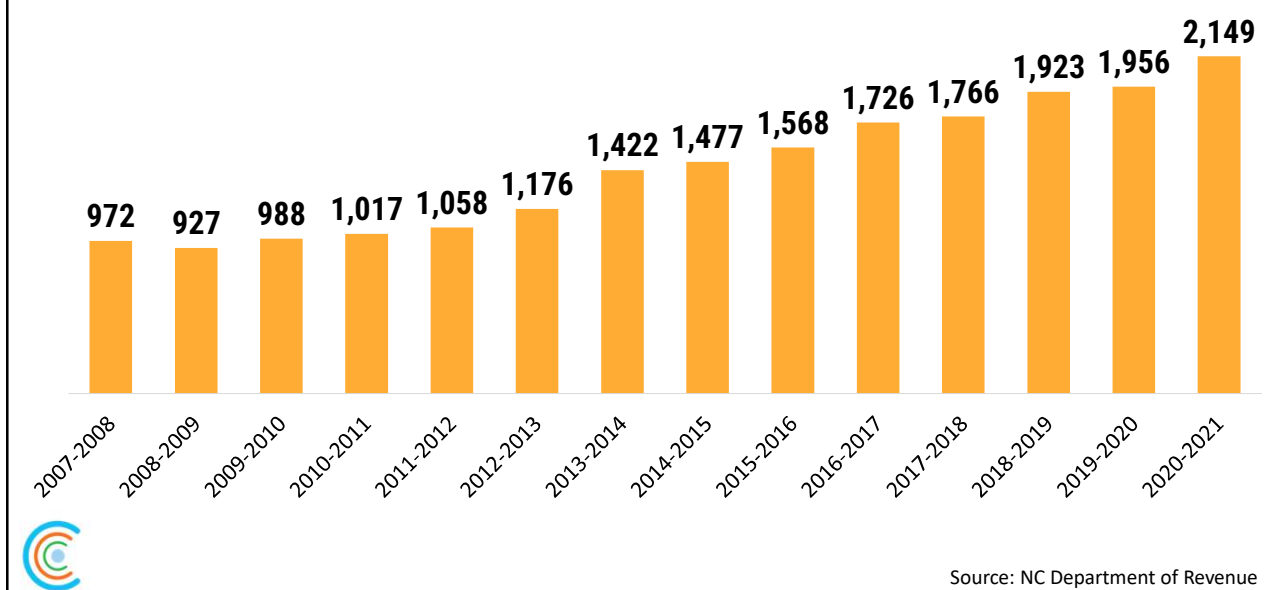
Taxable retail sales by month, 2019 through April 2022



135

Orange County Taxable Retail Sales Pass \$2 Billion

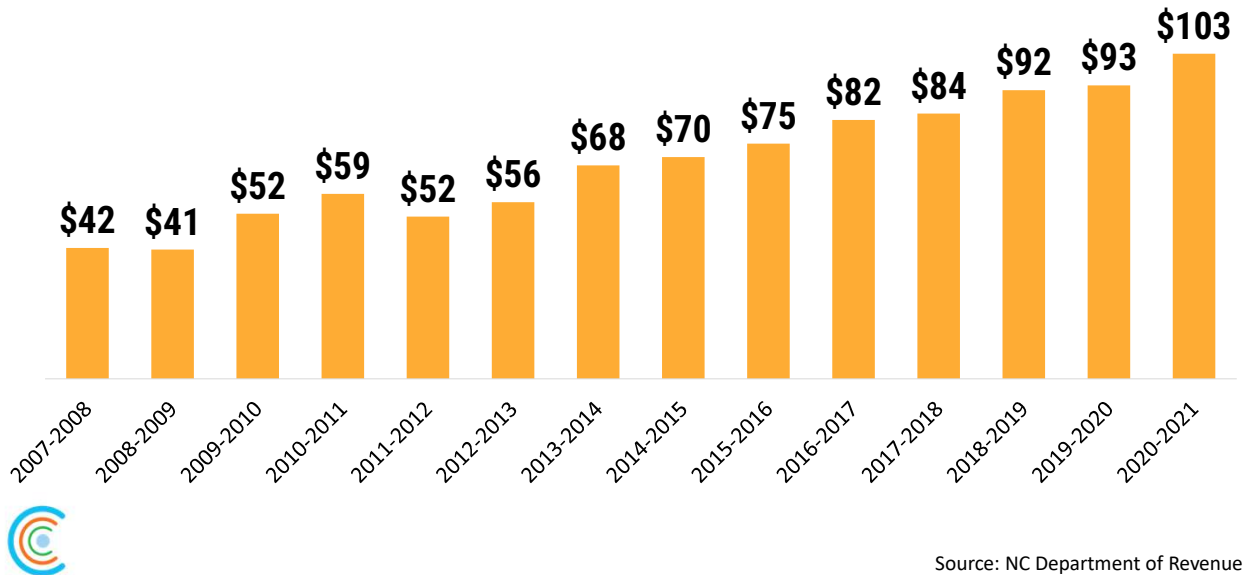
Orange County taxable retail sales (in \$millions), FY2008 to FY2021



136

Orange County Sales Tax Collections Over \$100M in FY2021

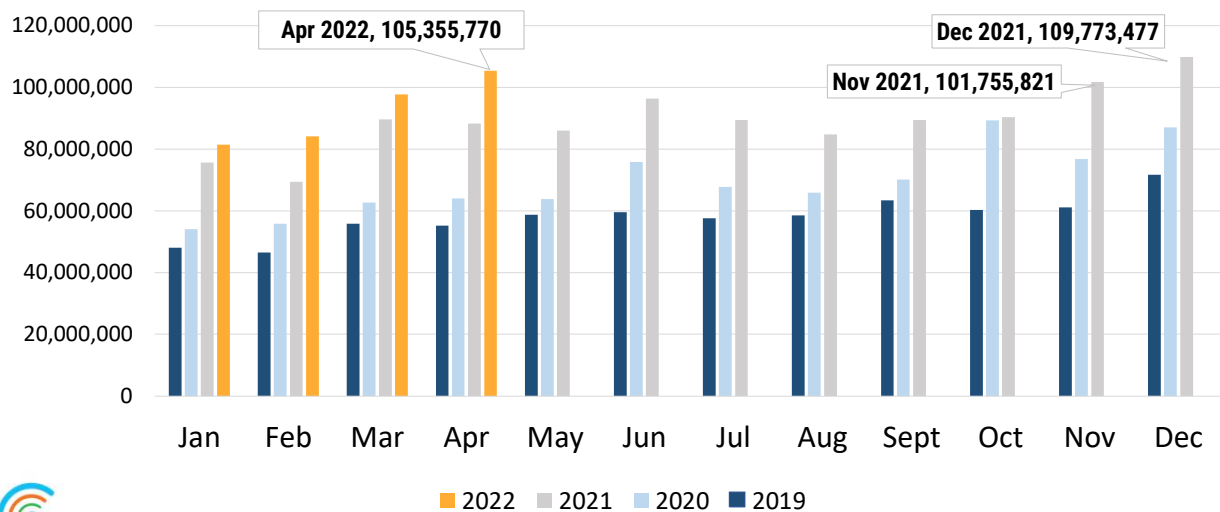
Annual sales tax collection (in \$millions), FY2008 to FY2021



137

Chatham County Retail Sales Grow Substantially Through the Pandemic

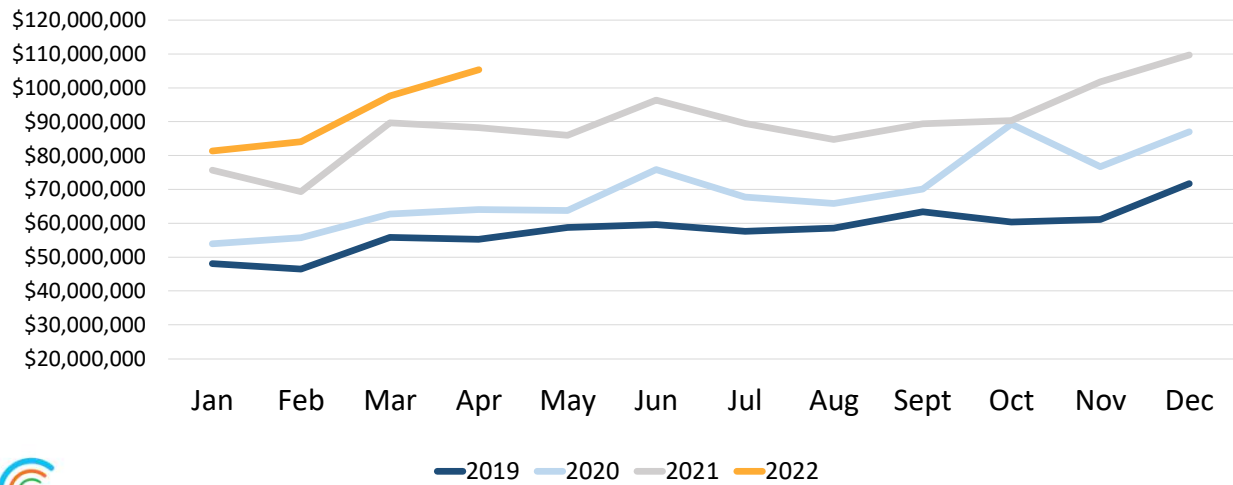
Chatham County taxable retail sales by month, 2019 through April 2022



138

Chatham County's Retail Sales Increase Year Over Year Despite Pandemic

Chatham County Taxable retail sales totals by month, 2019 through April 2022

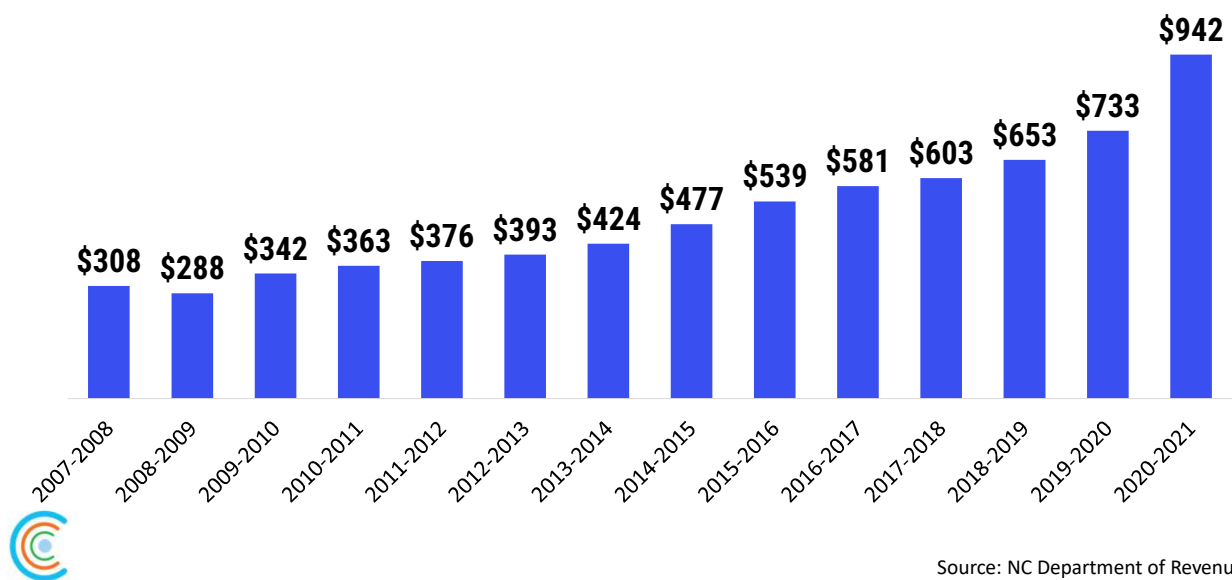


Source: NC Department of Revenue

139

Chatham County Taxable Sales up \$73 million in FY20

Taxable retail sales (\$millions), FY2008 to FY2021

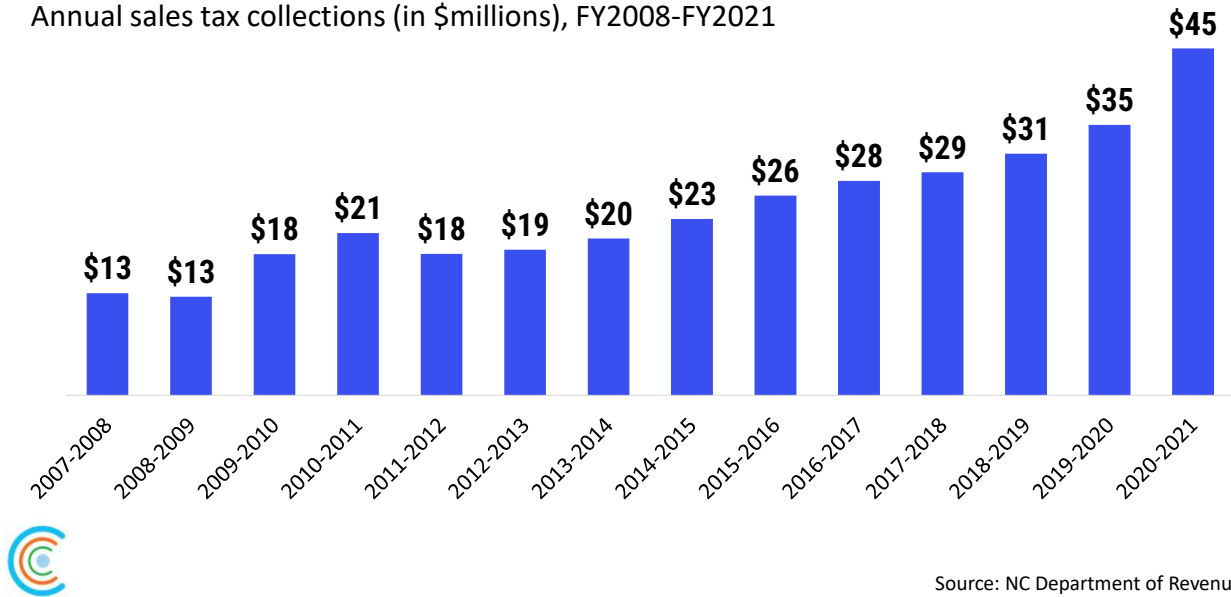


Source: NC Department of Revenue

140

Chatham County Sales Tax Collections Set New Record in FY2021

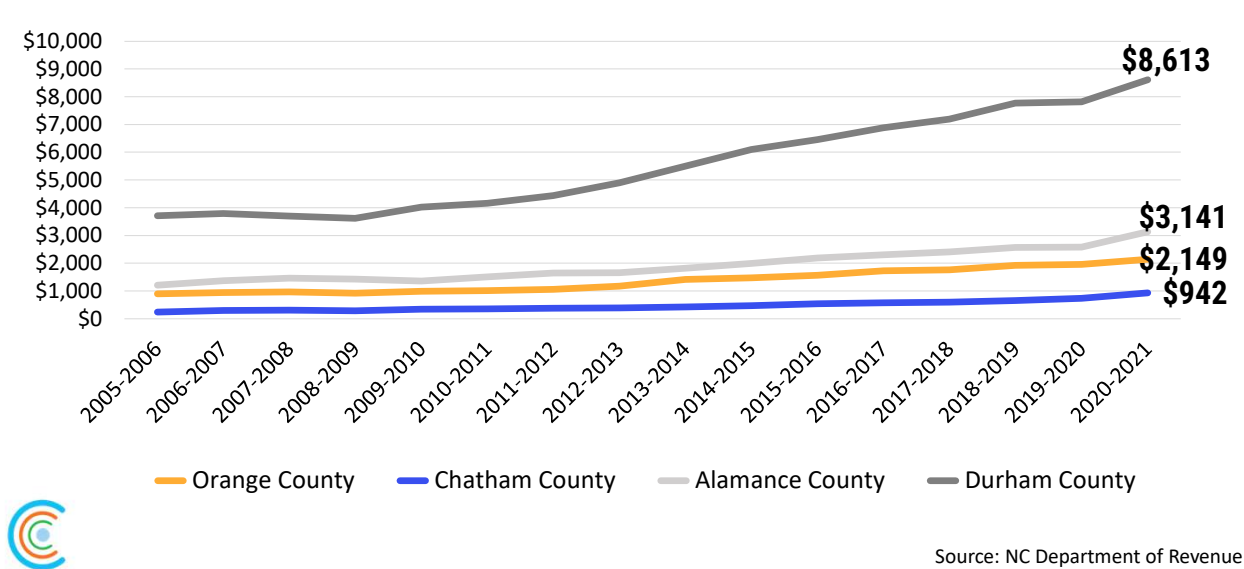
Annual sales tax collections (in \$millions), FY2008-FY2021



141

Retail Sales Grow Across the Region, with Durham County up \$800 Million Last Year

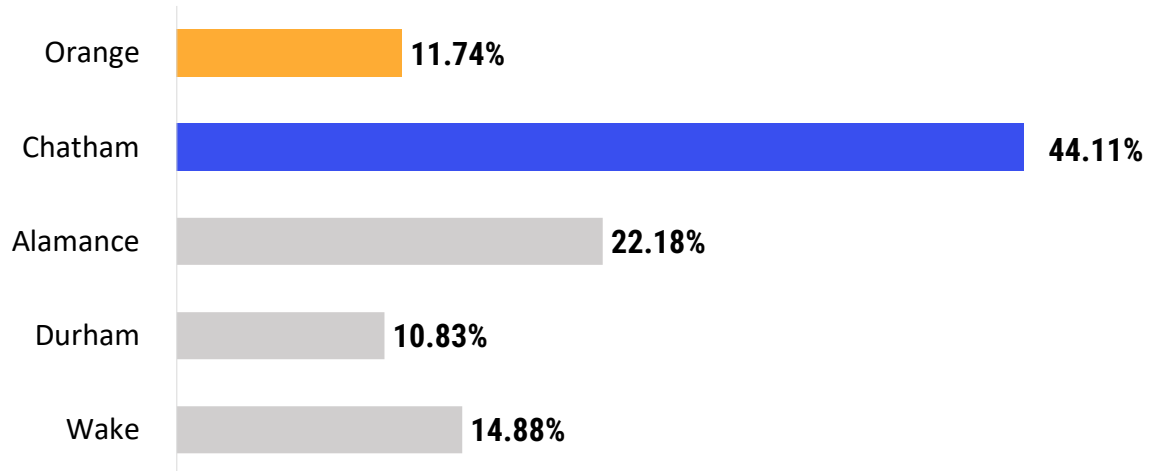
Taxable retail sales (in \$billions), FY2008 to FY2021



142

Chatham County Leads Percentage Growth in Retail Sales Tax Collection from FY2019 to FY2021

Percent change in gross retail sales tax collection, FY2019 to FY2021

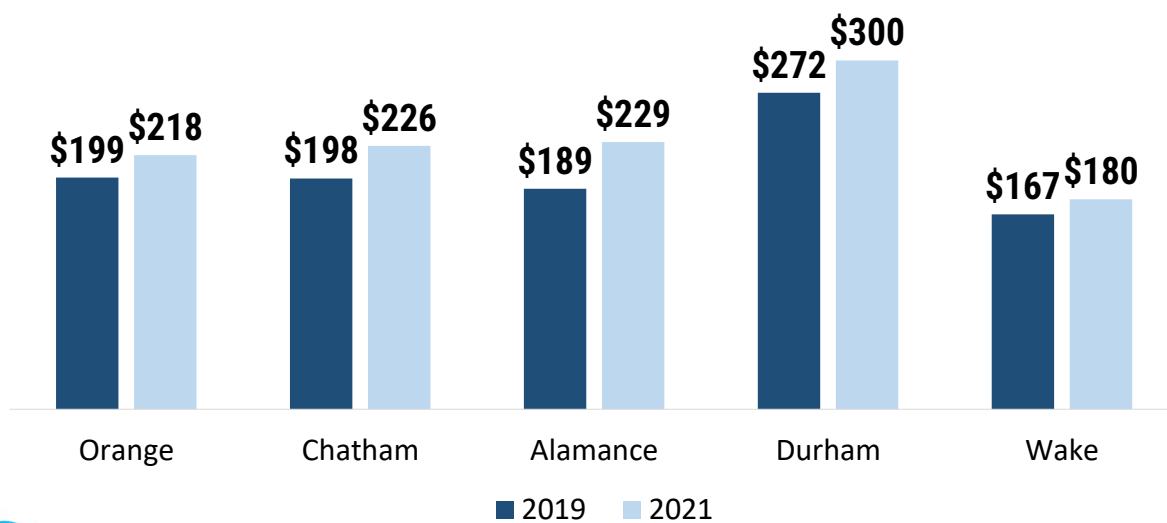


Source: NC Department of Revenue

143

Sales Tax Per Capita Grows Across the Region

Sales tax revenue per capita FY2019 vs. FY2021



Source: NC Department of State Treasurer

144

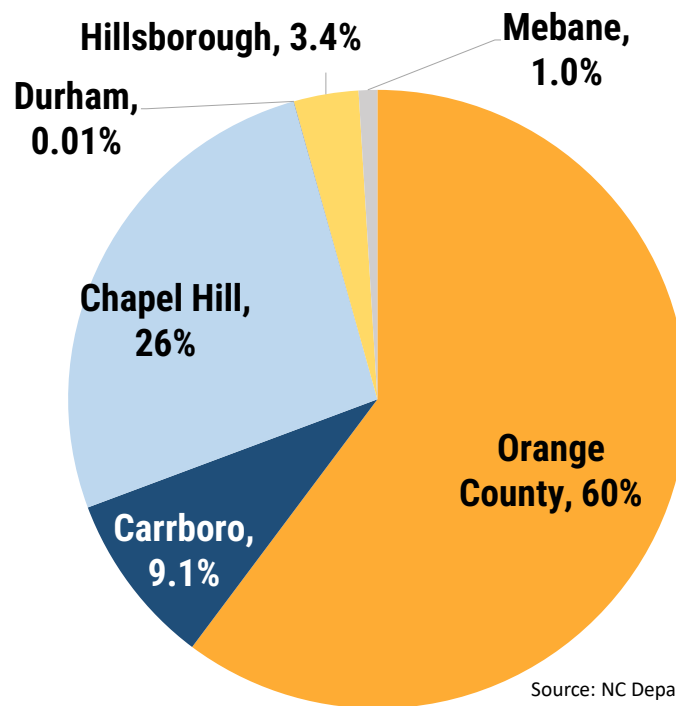
Sales Tax Disbursements



145

Orange County Sales & Use Tax Disbursements

How Orange County's Sales and Use Tax is distributed to the county and among its municipalities. FY2021

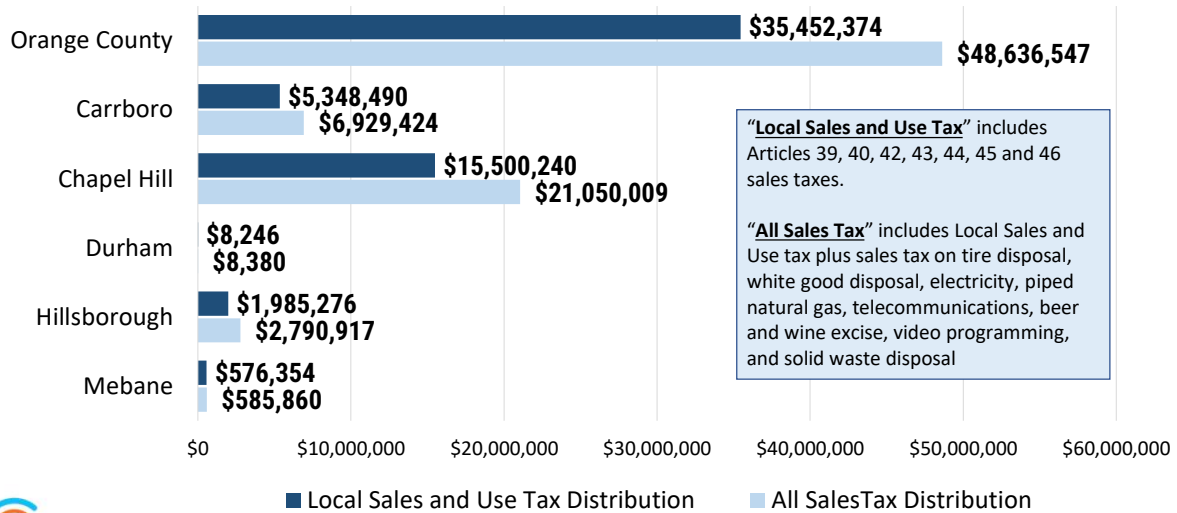


Source: NC Department of Revenue

146

FY2021 Orange County Sales Tax Disbursements

FY2021 Orange County sales tax disbursements to county and municipalities



147

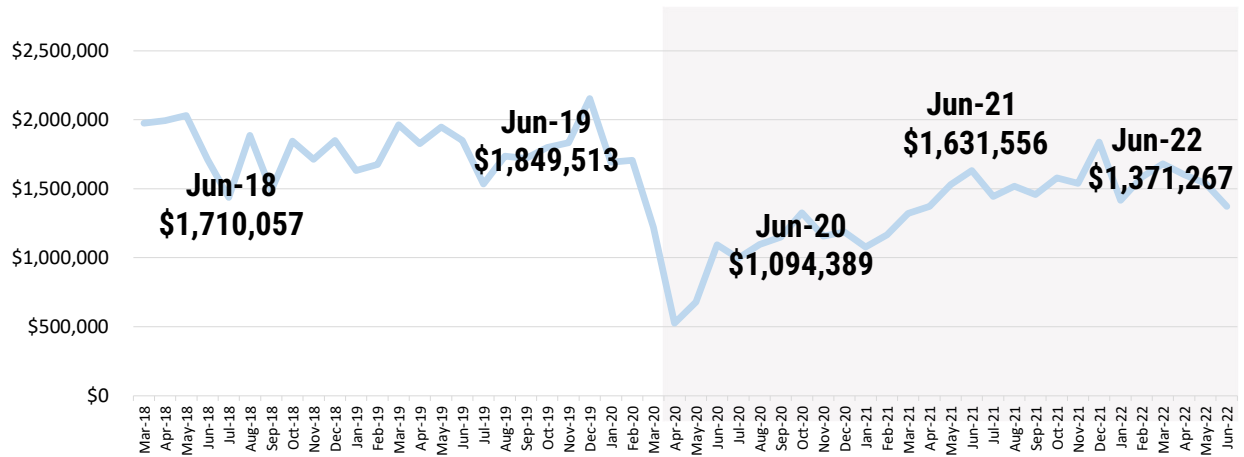
Chamber Small Business Index



148

Chamber Small Business Index Recovers, But Not to Pre-Pandemic Levels

Cohort of 40 diverse local businesses' combined monthly credit card transaction values, Feb 2018 – June 2022

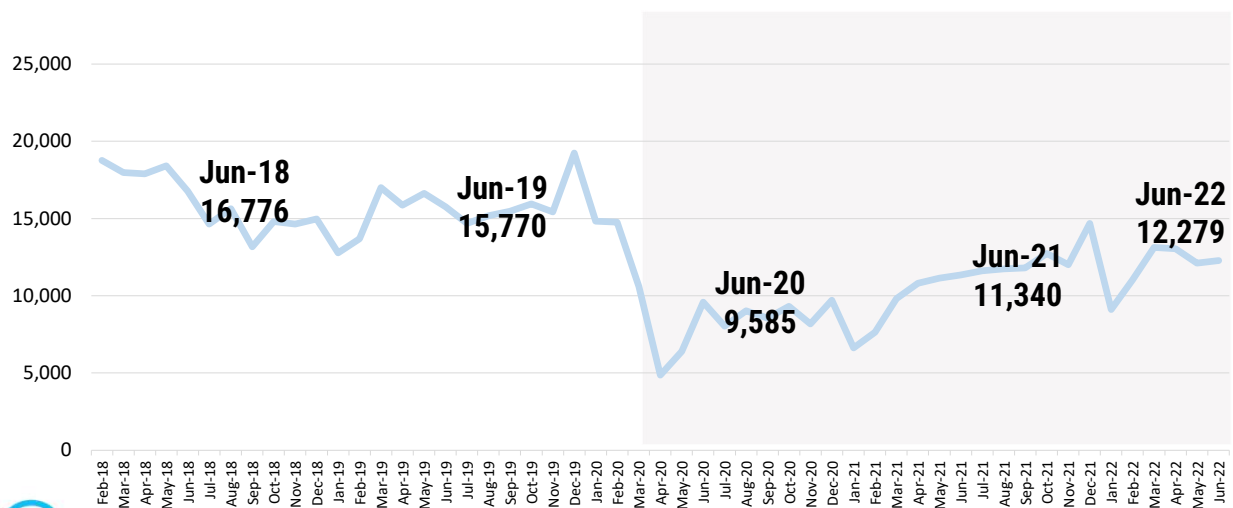


Source: The Chamber's 40-Business Index

149

Chamber Small Business Index Still 3K Card Swipes Behind Pre-Pandemic Monthly Totals

Cohort of 40 diverse local businesses' combined monthly credit card transaction volume, Feb 2018 – June 2022

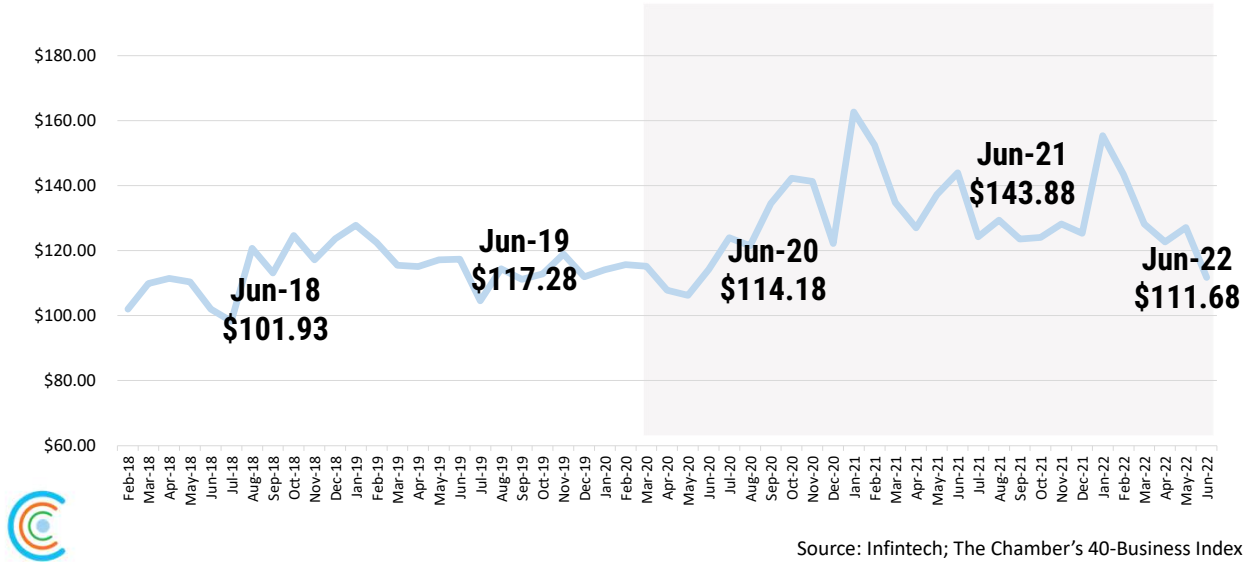


Source: The Chamber's 40-Business Index

150

Chamber Small Business Index Shows Credit Card Swipe Value Strength Through Pandemic

Cohort of 40 diverse local businesses' average credit card transaction value, Feb 2018 – June 2022



151

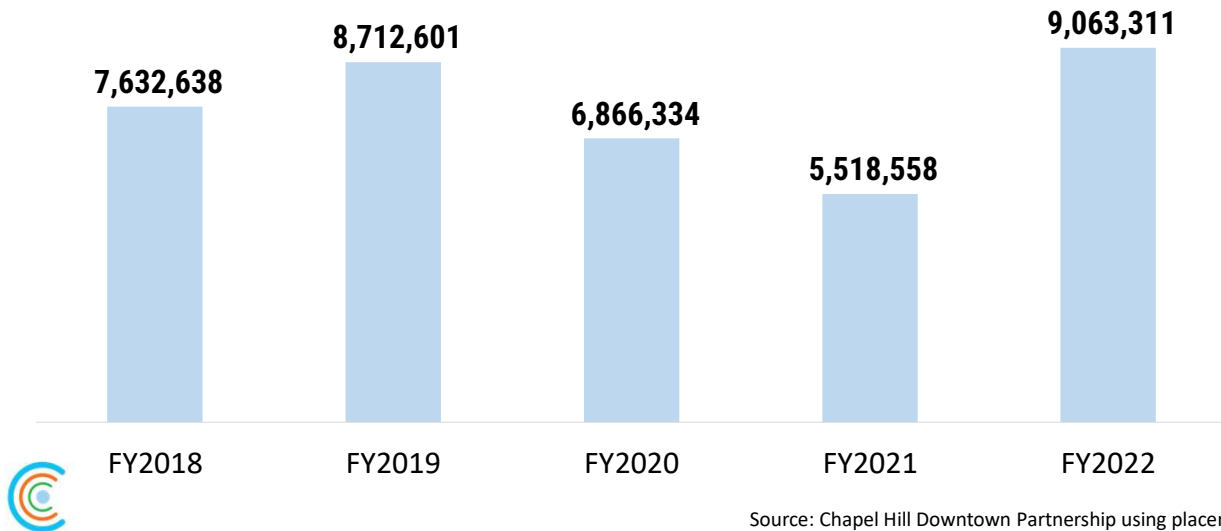
Downtown Pedestrian Activity



152

9 Million Pedestrians in Downtown Chapel Hill in FY2022 Marks a 5-Year High

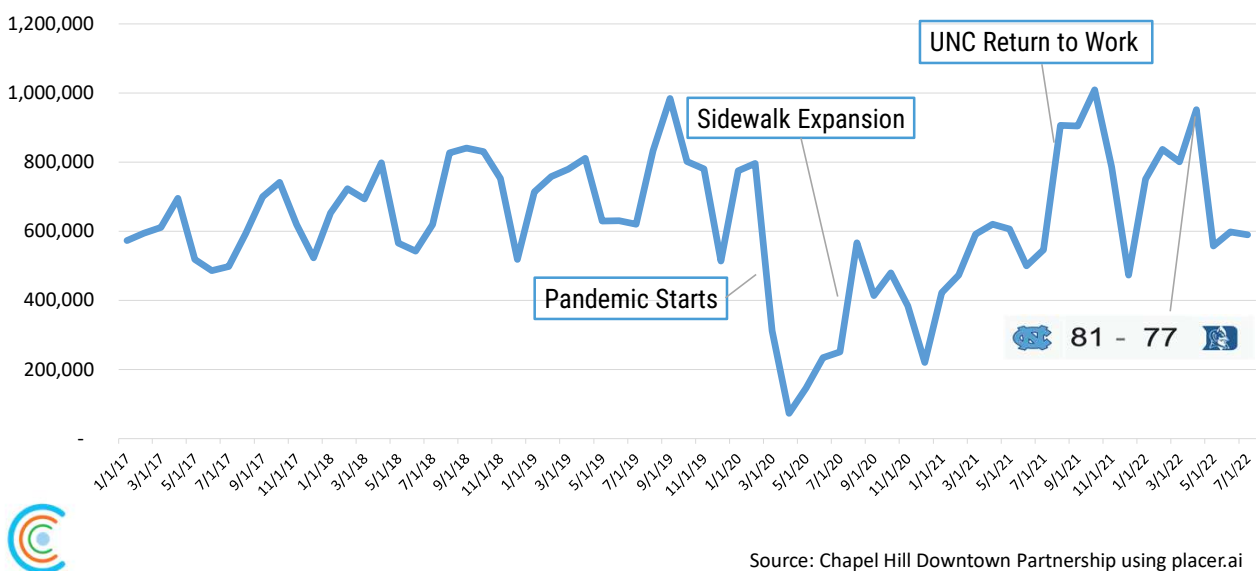
Downtown Chapel Hill annual pedestrian counts FY2018 through FY2022



153

Monthly Downtown Chapel Hill Pedestrian Traffic

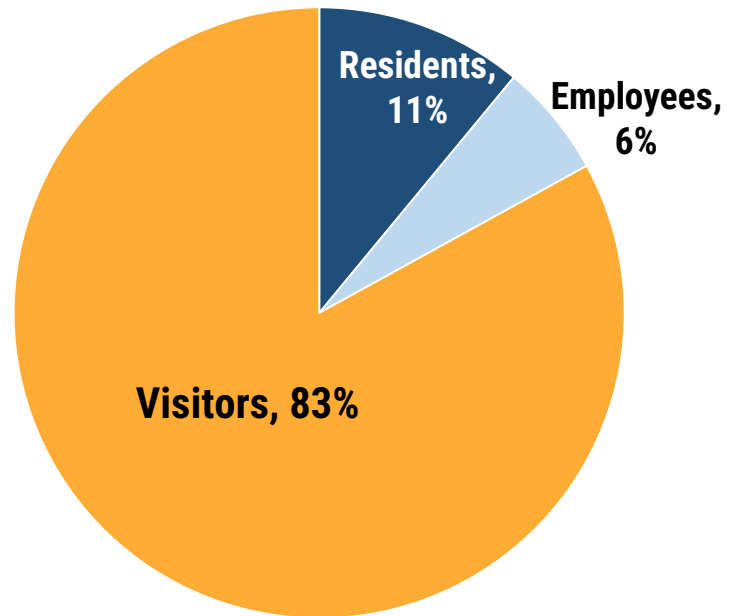
From January 2017 to July 2022



154

Visitors Represent 83% of Downtown Pedestrians in 2022

Downtown pedestrians by type

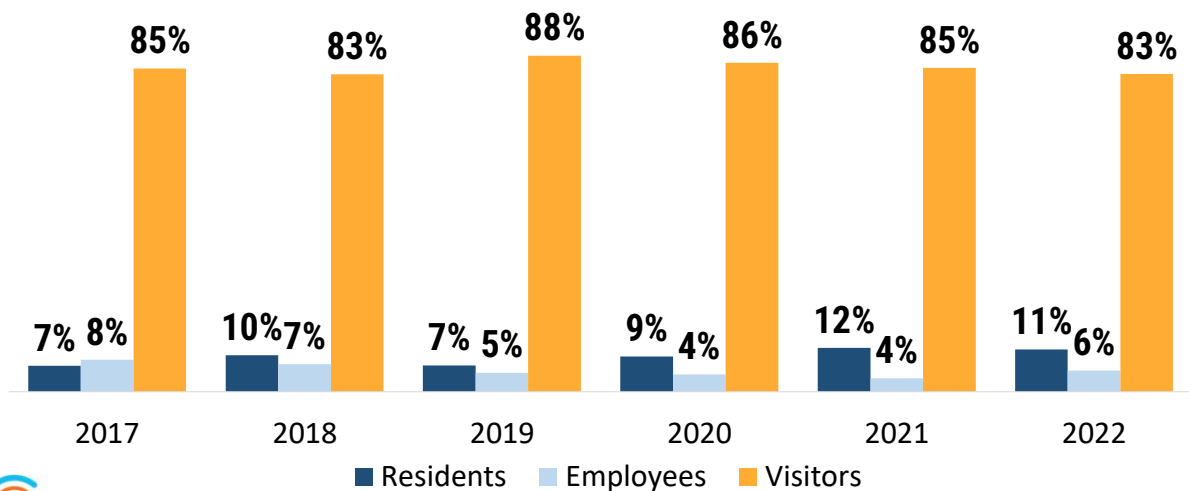


Source: Chapel Hill Downtown Partnership using placer.ai

155

Visitors Represent More than 83% of Downtown Pedestrians

Downtown pedestrians by type, 2017 to 2022

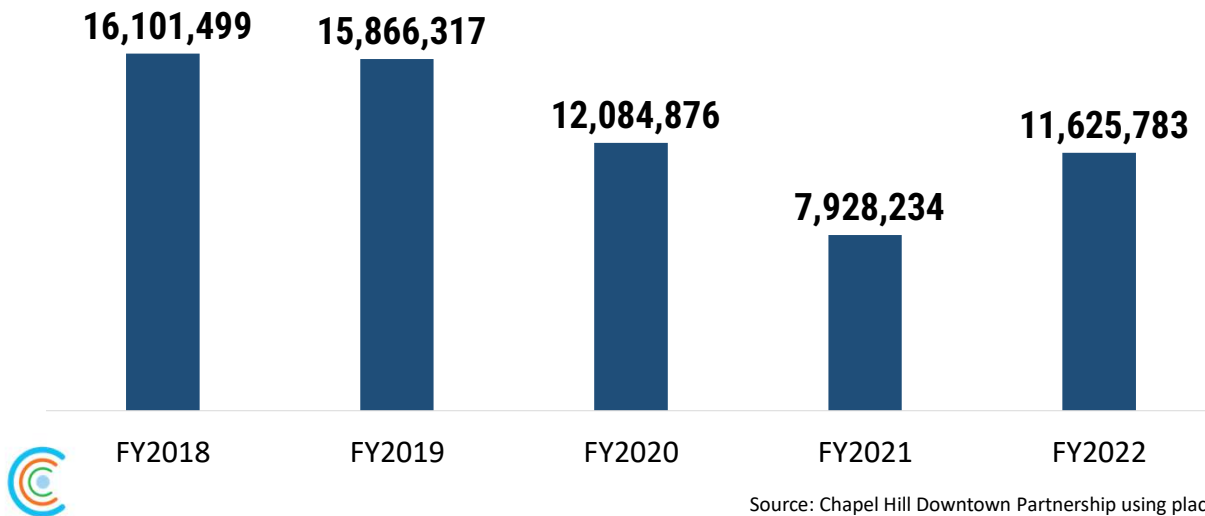


Source: Chapel Hill Downtown Partnership using placer.ai

156

Downtown Durham Pedestrian Traffic Rebounds, But Well Below Pre-Pandemic Levels

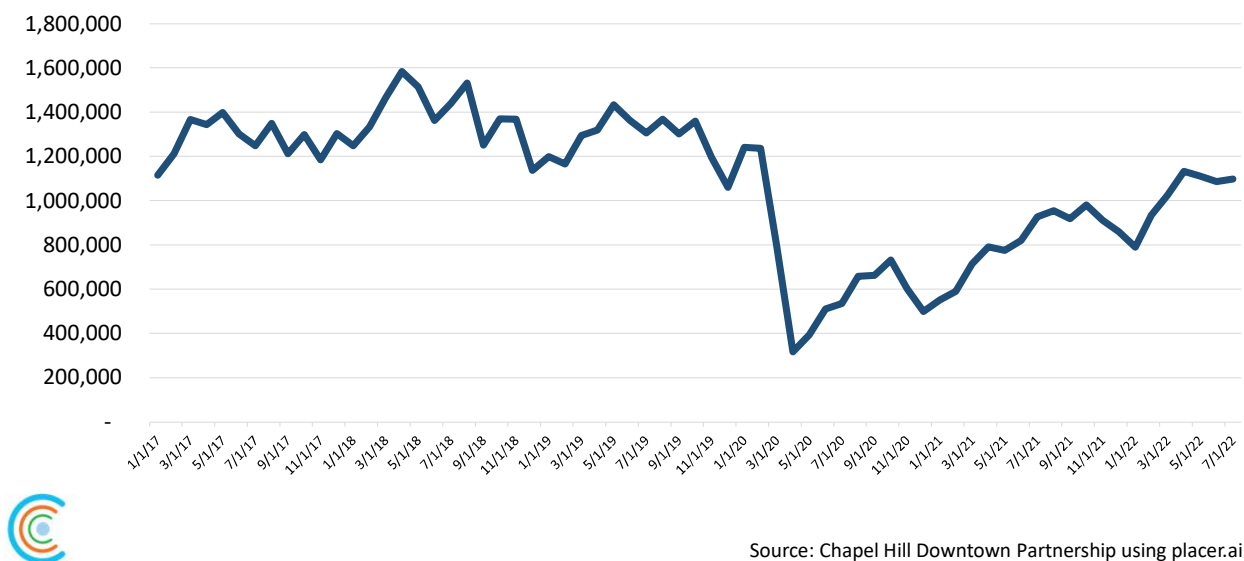
Downtown Durham pedestrian traffic from FY2018 to FY2022



157

Monthly Downtown Durham Pedestrian Traffic

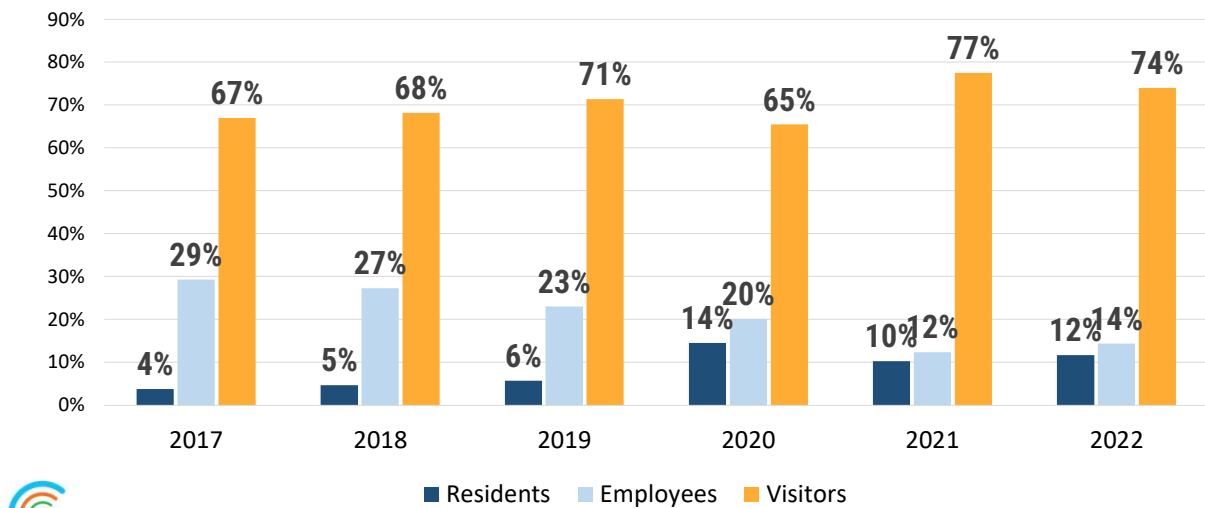
From January 2017 to July 2022



158

Percent of Pedestrians that are Employees in Downtown Durham Declines, Visitor Percent Up

Percent of downtown pedestrians by type, 2017 to 2022



Source: Chapel Hill Downtown Partnership using placer.ai

159

North Carolina Foot Traffic Recovery

Jul, 2022 Compared To Jul, 2019



Source: Chapel Hill Downtown Partnership using placer.ai

160

Chapel Hill Downtown Partnership, Chapel Hill, North Carolina Foot Traffic Recovery

Jul, 2022 Compared To Jul, 2019



161

Tourism and Hospitality



162

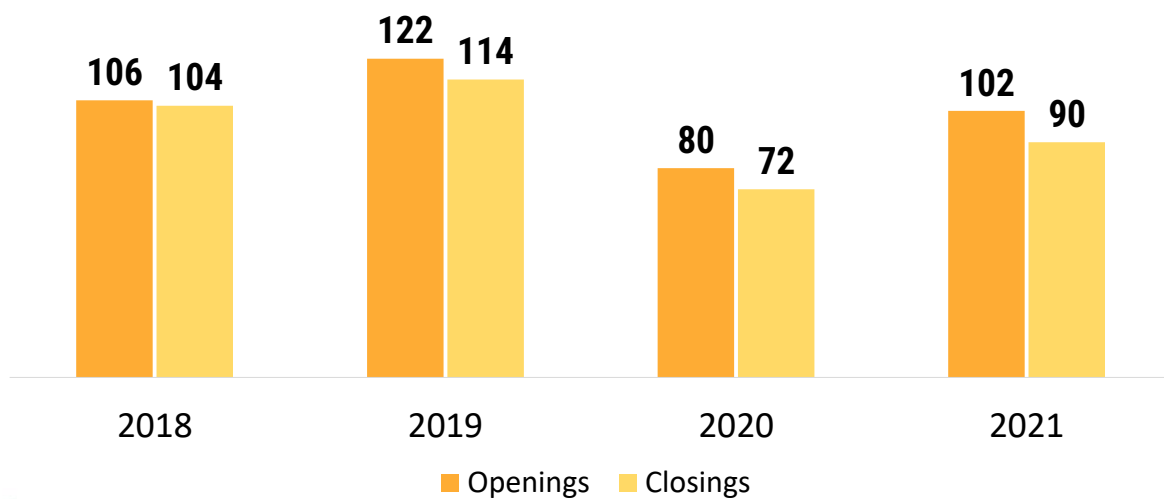
Restaurants



163

More Restaurants Open Than Close in Pandemic

Orange County restaurant and food service establishments openings & closings, 2018-2021

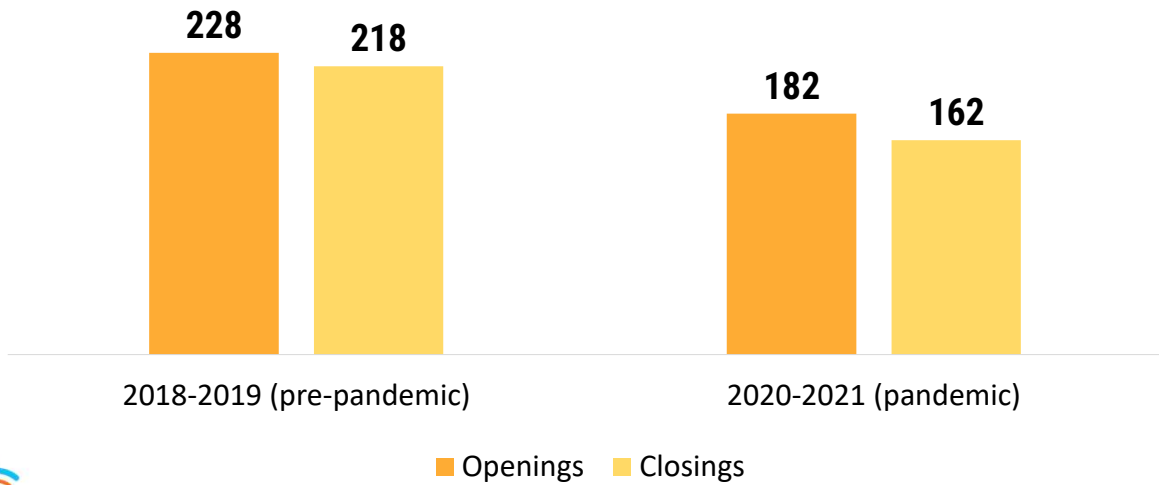


Source: Orange County Health Department, Environmental Health

164

Both Restaurant Openings and Closings Decline in Pandemic

Orange County restaurant and food service establishments openings & closings, 2018-19 vs. 2020-21



Source: Orange County Health Department, Environmental Health

165

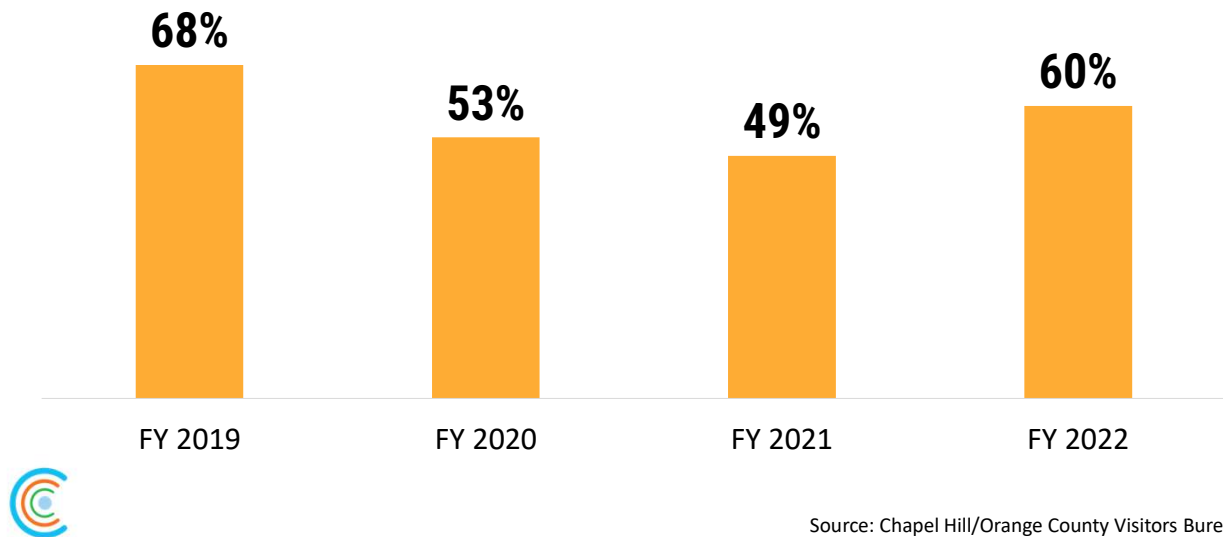
Orange County Hotels



166

Orange County Hotels Average Daily Occupancy Rebounds from Pandemic Lows

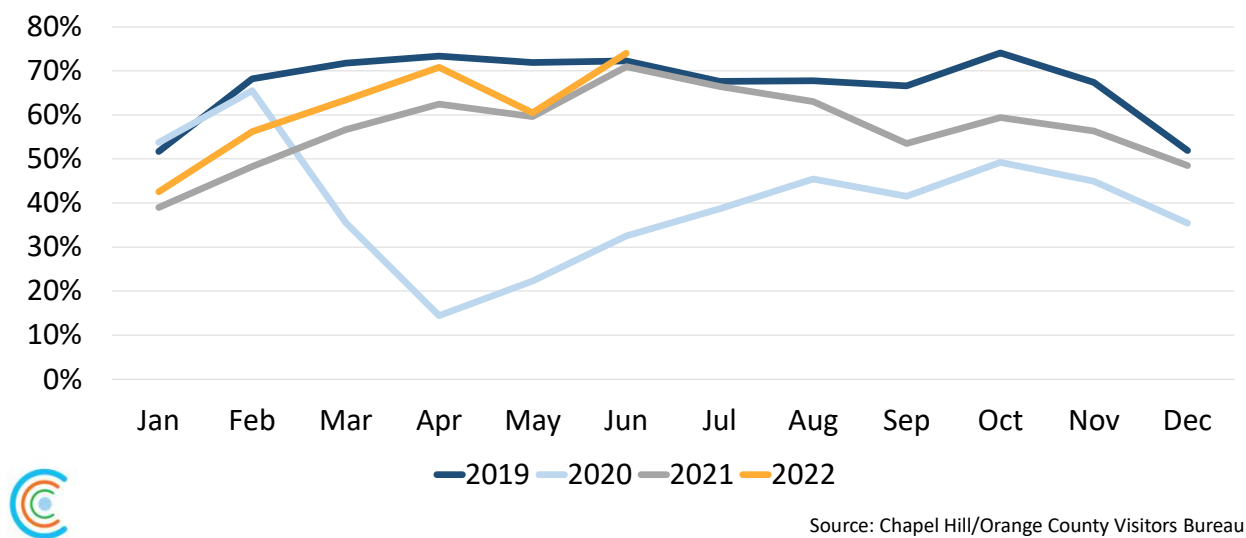
Average daily hotel occupancy rate, FY2019 through FY2022



167

Orange County Average Hotel Occupancy

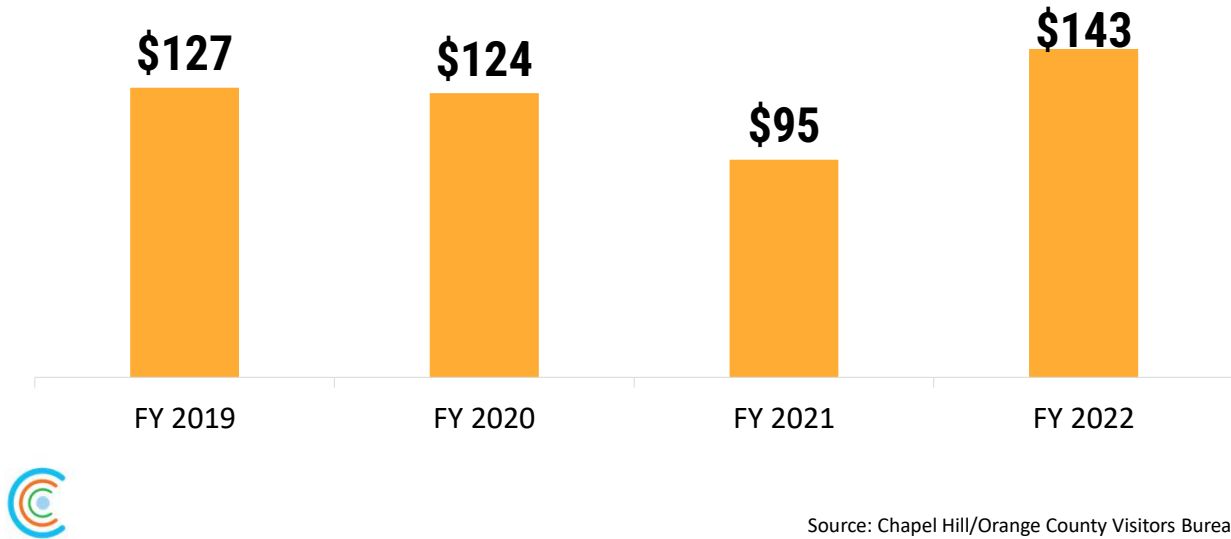
Average daily hotel occupancy rate by month, 2019 through June 2022



168

Orange County Hotel Average Daily Rate Rebounds in 2022 From 2021 Low

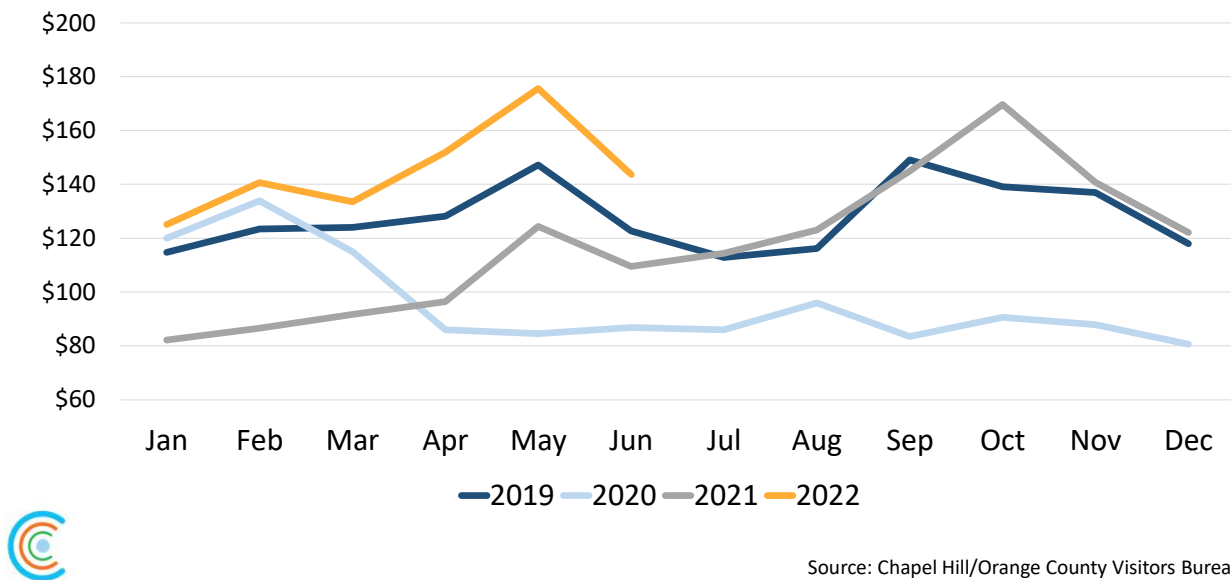
County average daily hotel room rate, FY2019-FY2022



169

Orange County Hotel Average Daily Rate

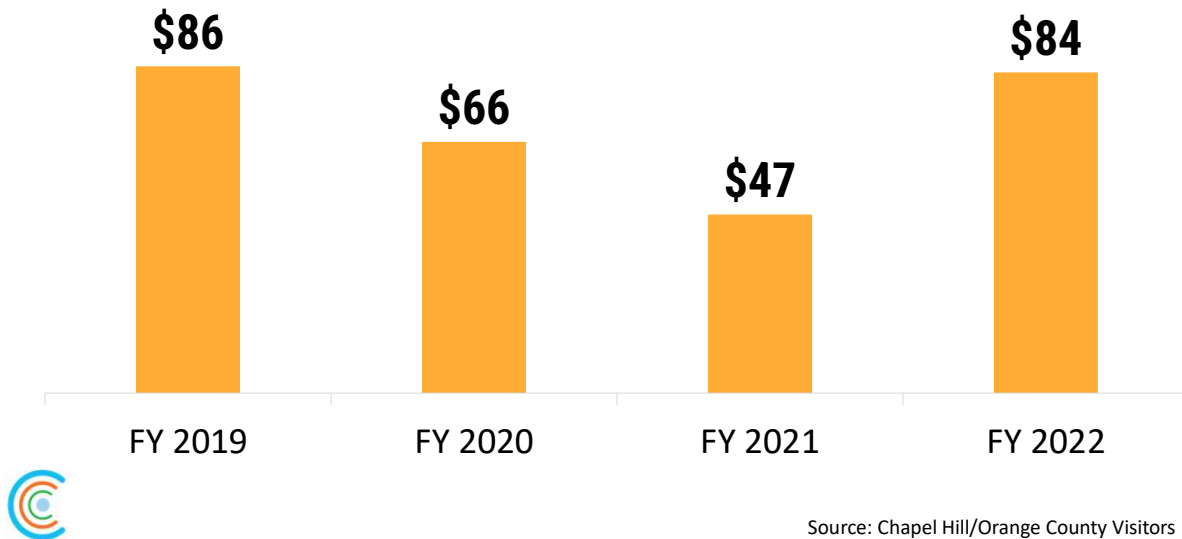
County average daily hotel room rate by month, 2019 to 2022



170

Orange County RevPAR Returns to 2019 Levels

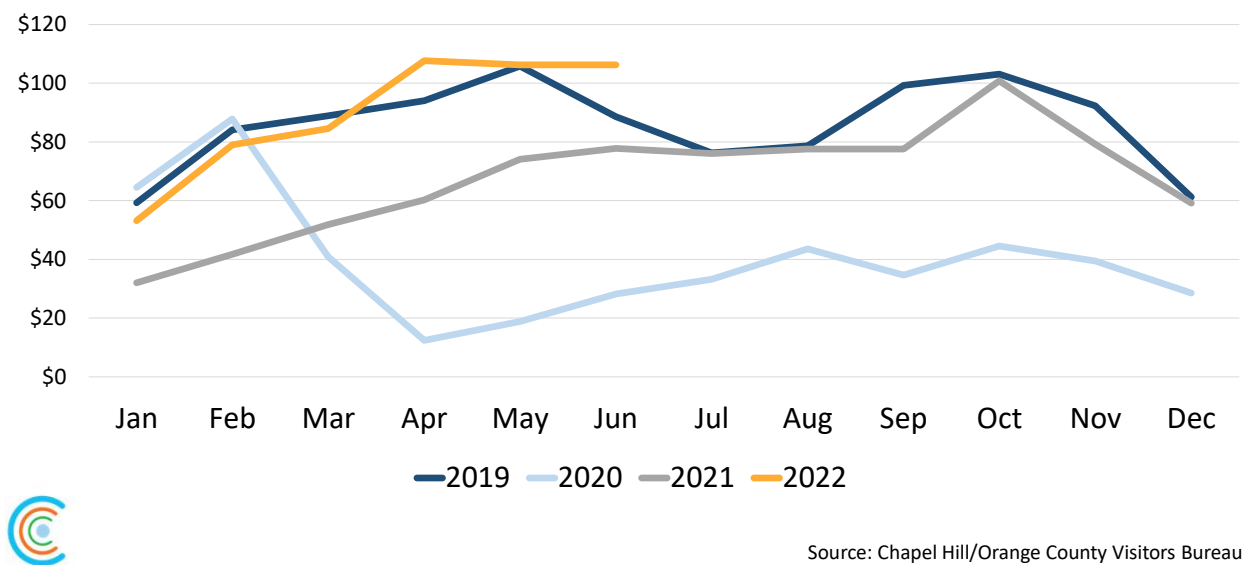
County average revenue per available room (RevPAR), FY2019-FY2022



171

Orange County Hotel Average Revenue per Room

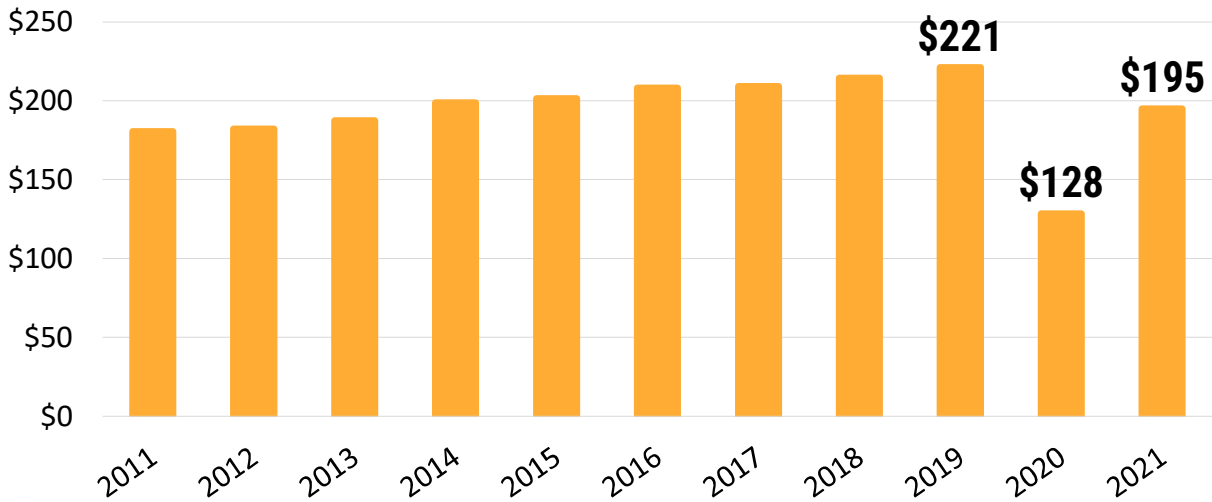
County average revenue per available room (RevPAR) by month, FY2019-FY2022



172

Orange County Visitor Expenditures Rebound in 2021

2011-2021; domestic visitor spending (\$millions), adjusted for inflation, \$2021



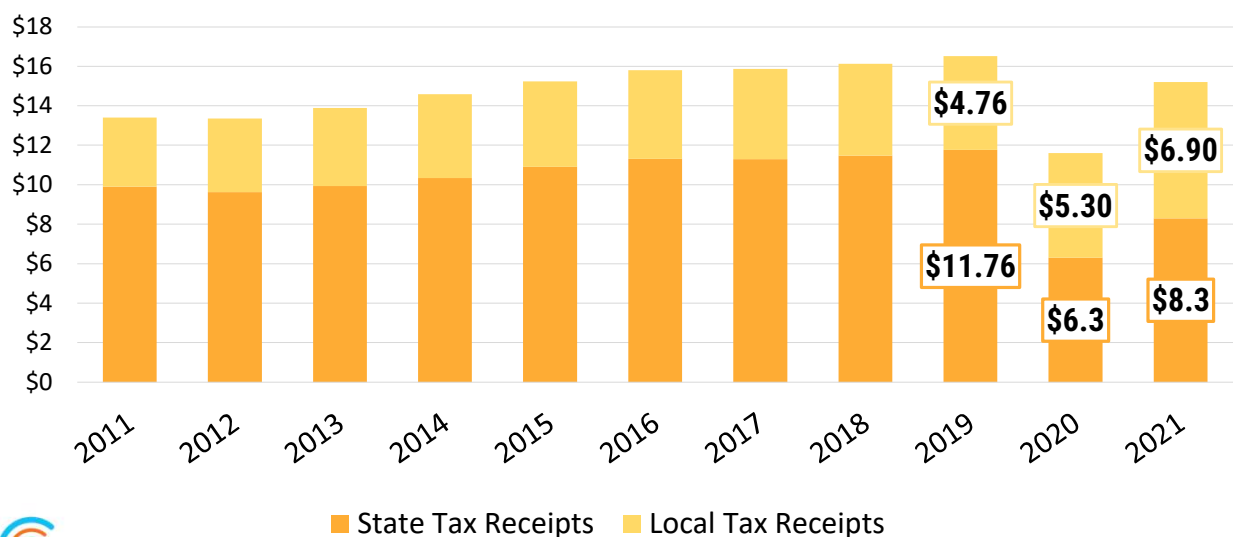
Note: In 2020 the reporting was expanded from domestic visitors to include international visitors

Source: Visit North Carolina

173

Orange County Revenues from Tourism (in millions)

FY2011 to FY2021; adjusted for inflation, \$2021

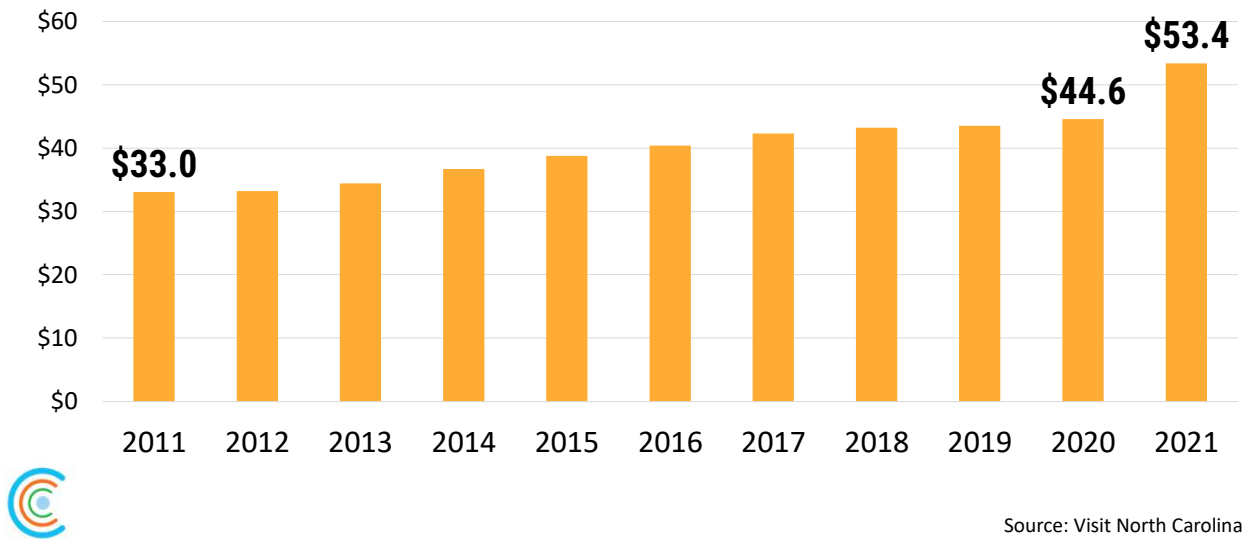


Source: Visit North Carolina

174

Orange County Tourism Labor Income Shows Continued Strong Growth

(in millions), adjusted for inflation \$2021



175

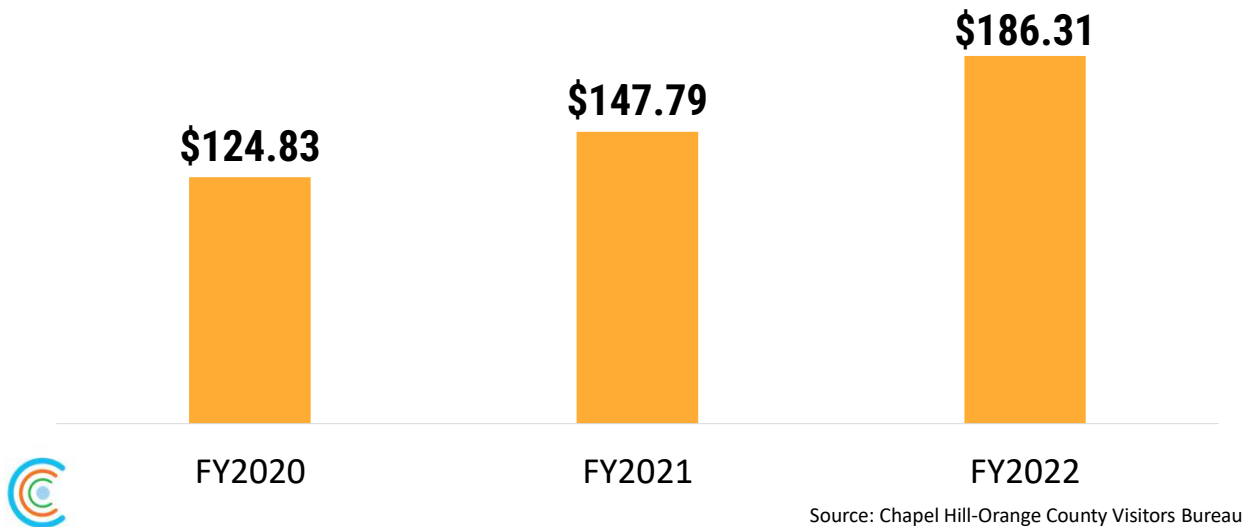
Short Term Rentals (STRs)



176

Orange County Short Term Rental Nightly Room Rate Continues to Grow

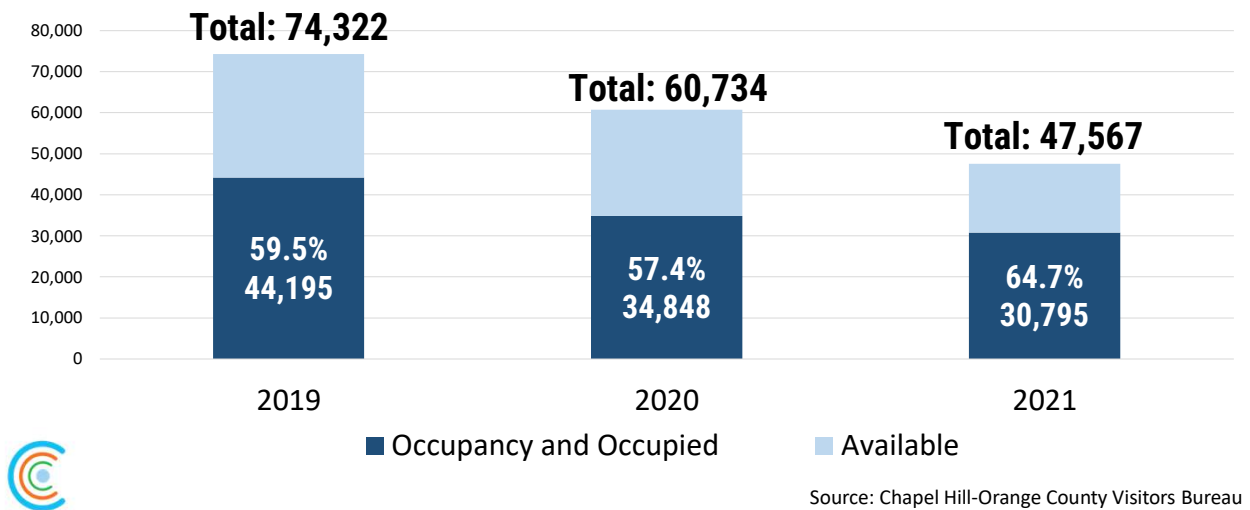
Short term rental average daily rate (ADR), FY2020 – FY2022



177

Short Term Rental Occupancy Rates Go Up as Supply Decreased During the Pandemic

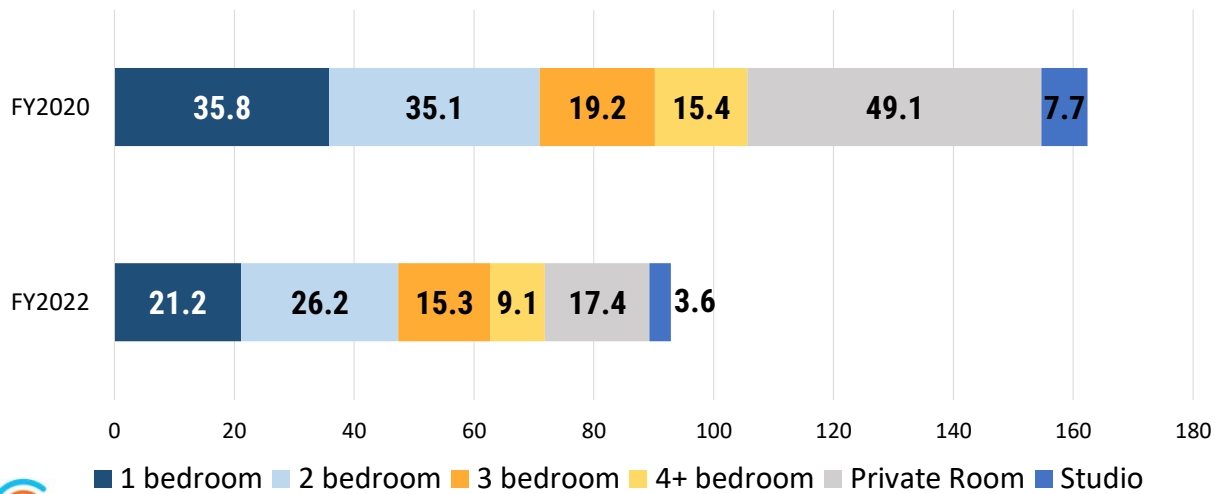
Total annual available room nights in Orange County by year, rental occupancy status, and occupancy rate Jan-Aug, FY2019 to FY2021



178

Orange County STR Annual Supply Contracted from 2020 to 2022 Across All Types

Short term rental (STR) annual supply (in thousands) in FY2020 and FY2022



Source: Chapel Hill-Orange County Visitors Bureau

179

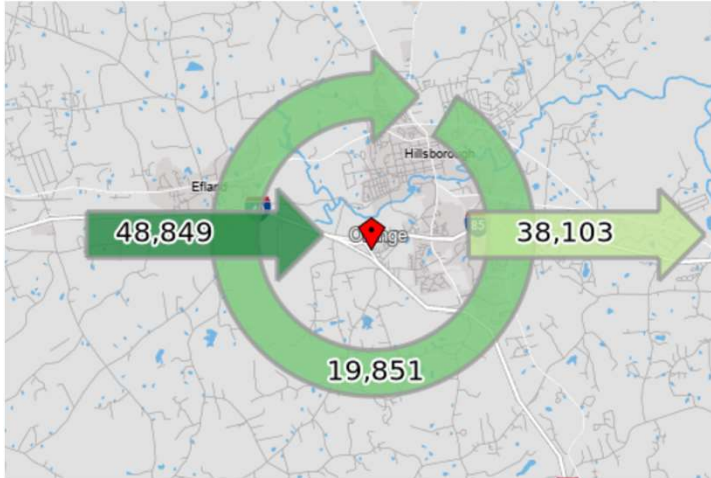
Commuting (Worker Inflow, Outflow)



180

Orange County Worker Inflows/Outflows, 2019

48,849 drive in, 38,103 drive out, and 19,851 live and work in Orange County



Inflow/Outflow Job Counts in 2019

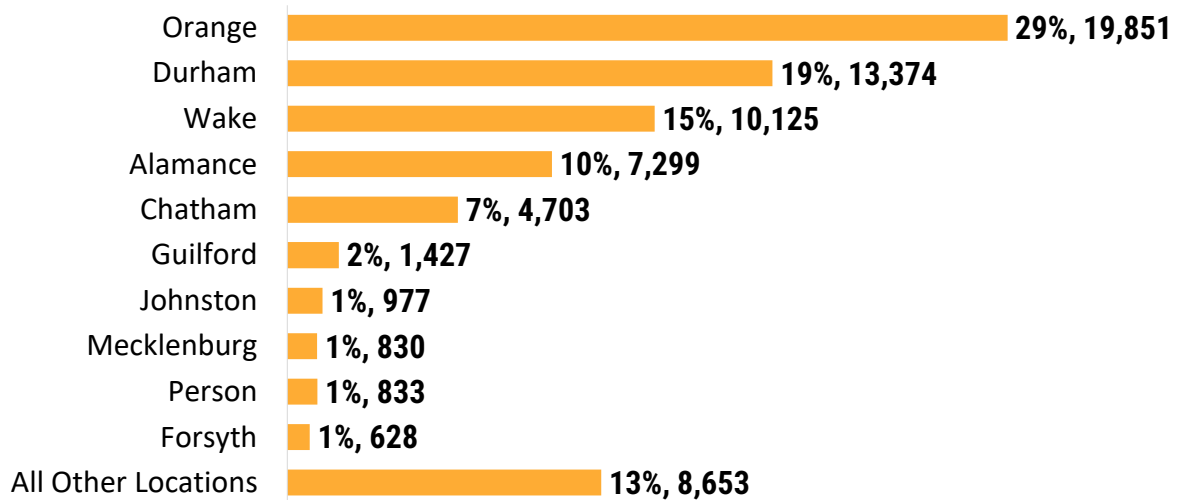


Source: U.S. Census Bureau LODES (OnTheMap)

181

Where do Orange County's 68,700 Workers Live?

The people who work in Orange County by county of residence, 2019

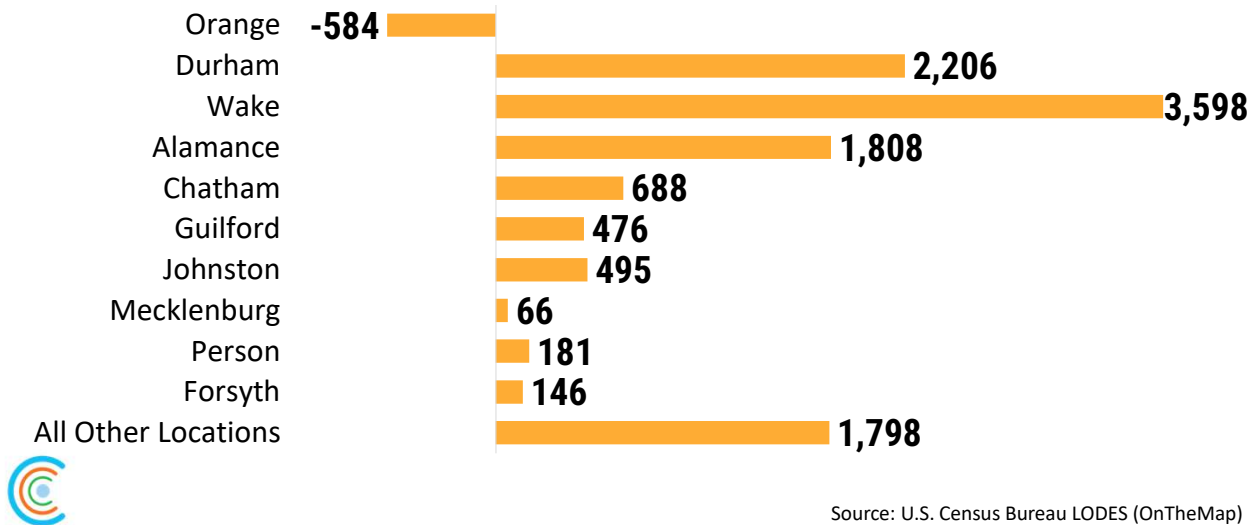


Source: U.S. Census Bureau LODES (OnTheMap)

182

Change in Where Orange County Workers Live 2009-2019

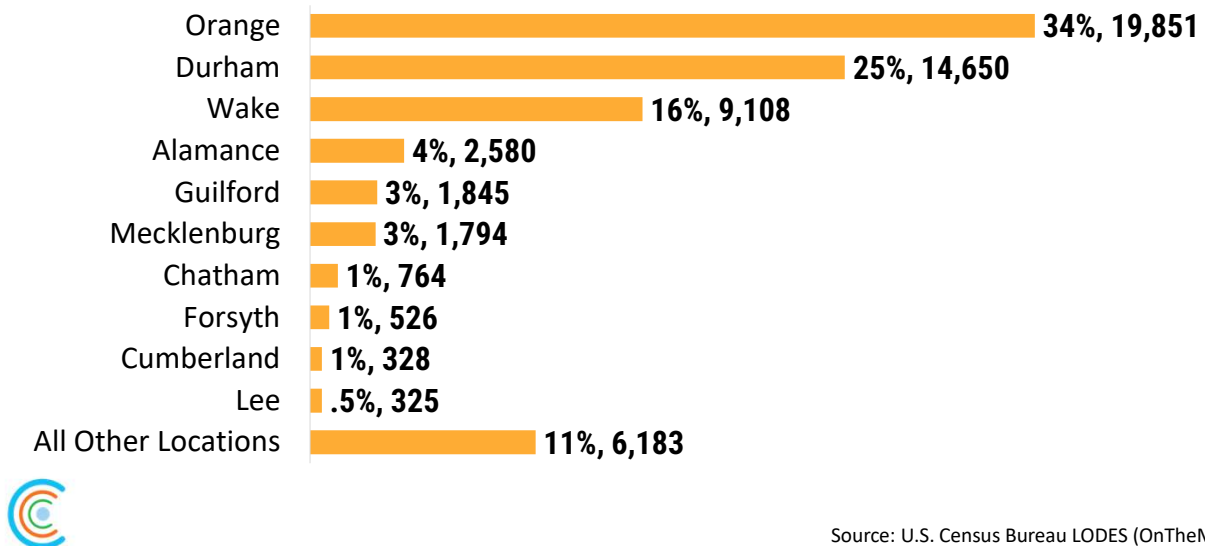
Change in where the people who work in Orange County live, by county of residence, between 2009 and 2019



183

Where do Orange County's 59,954 Working Residents Work?

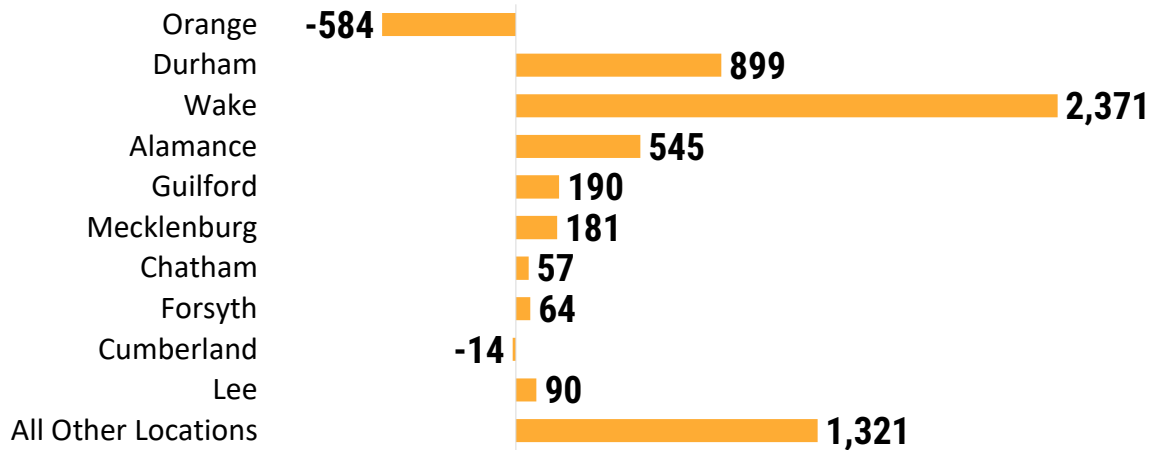
Location of primary job for Orange County residents, 2019



184

Change in Where Orange County Residents Work 2009 to 2019

Change in location of Orange County residents' primary job between 2009 and 2019

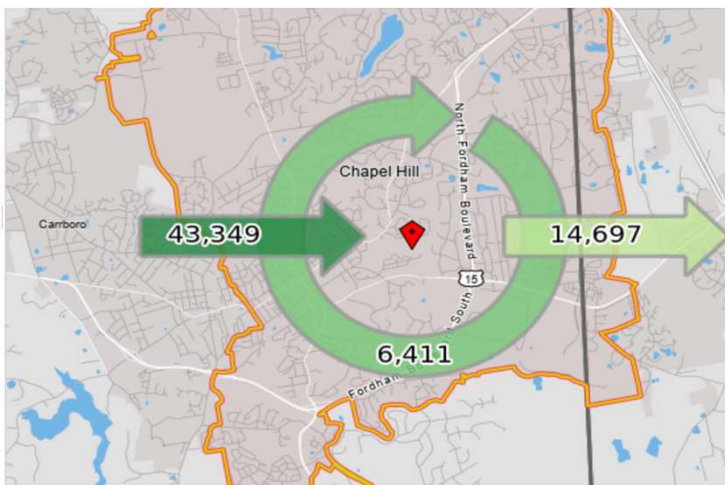


Source: U.S. Census Bureau LODS (OnTheMap)

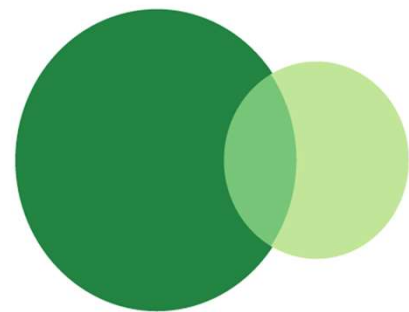
185

Chapel Hill Worker Inflows/Outflows, 2019

43,349 drive in, 14,697 drive out, and 6,411 live and work in Chapel Hill



Inflow/Outflow Job Counts in 2019



43,349 - Employed in Selection Area, Live Outside
 14,697 - Live in Selection Area, Employed Outside
 6,411 - Employed and Live in Selection Area

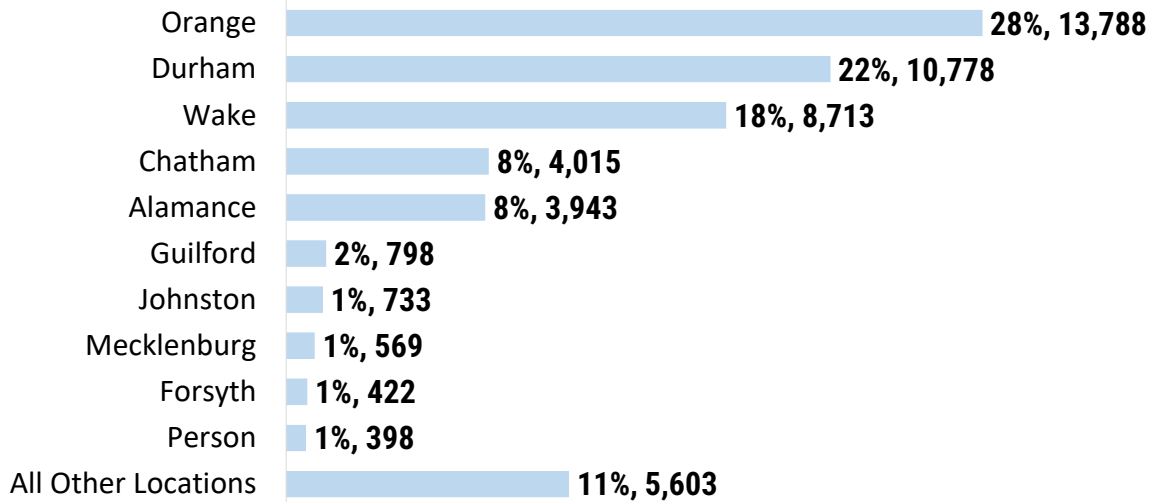


Source: U.S. Census Bureau LODS (OnTheMap)

186

Where do Chapel Hill's 49,760 Workers Live?

The people who work in Chapel Hill, by county of residence, 2019

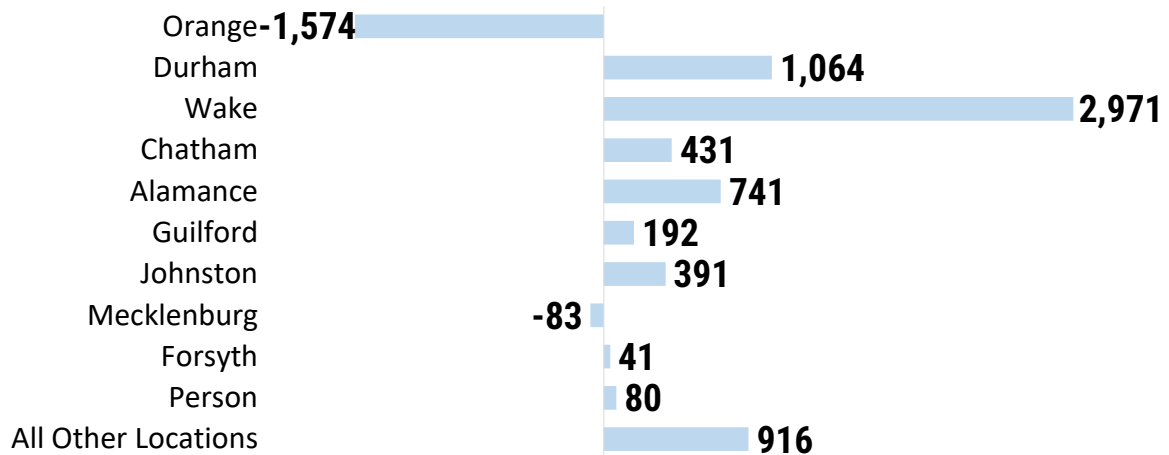


Source: U.S. Census Bureau LODS (OnTheMap)

187

Change in Where Chapel Hill Workers Commute from 2009 to 2019

Change in where the people who work in Chapel Hill live, by county of residence, between 2009 and 2019

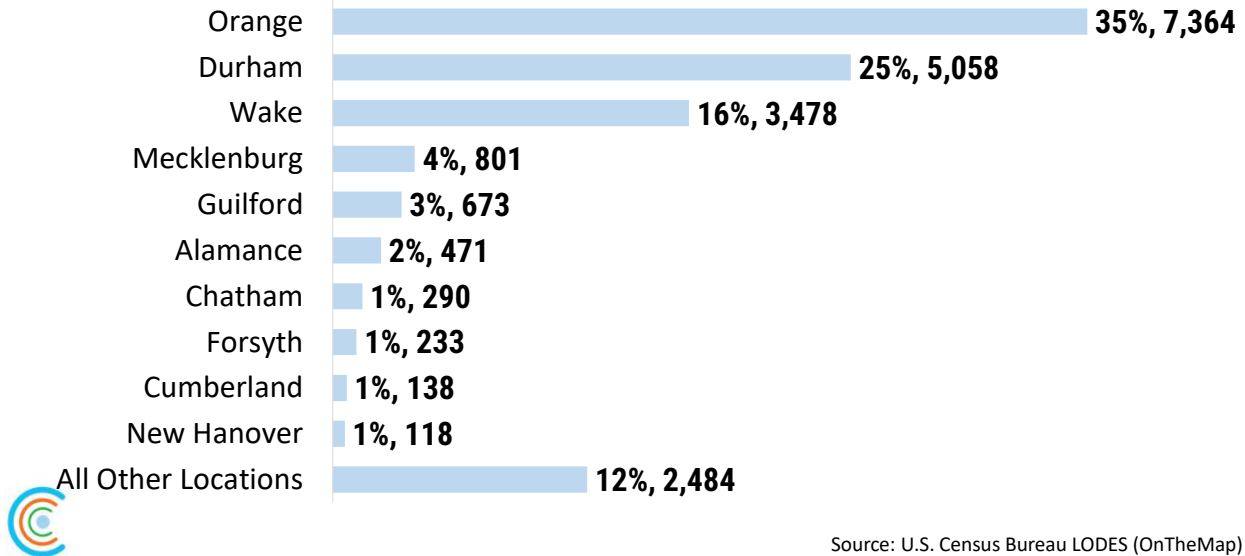


Source: U.S. Census Bureau LODS (OnTheMap)

188

Where do Chapel Hill's 21,108 Working Residents Go To Work? 65% Leave Orange County with 41% Working in Durham and Wake

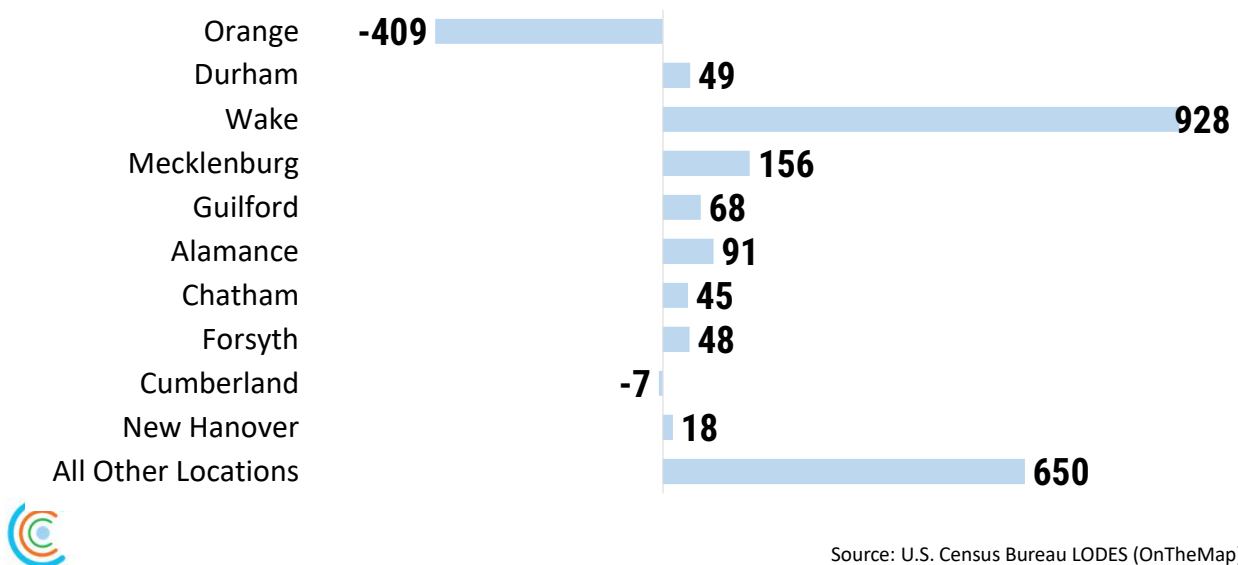
Location of primary job for Chapel Hill residents, 2019



189

Change in Where Chapel Hill Residents Work, 2009, 2019

Change in location of Chapel Hill residents' primary job between 2009 and 2019



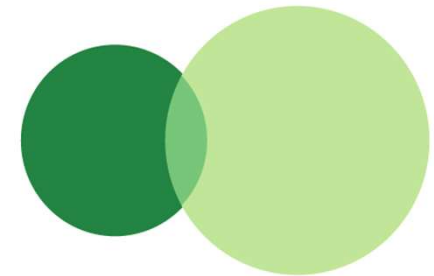
190

Carrboro Worker Inflows/Outflows, 2019

3,981 drive in, 8,516 drive out, and 627 live and work in Carrboro



Inflow/Outflow Job Counts in 2019



3,981 - Employed in Selection Area, Live Outside
8,516 - Live in Selection Area, Employed Outside
627 - Employed and Live in Selection Area

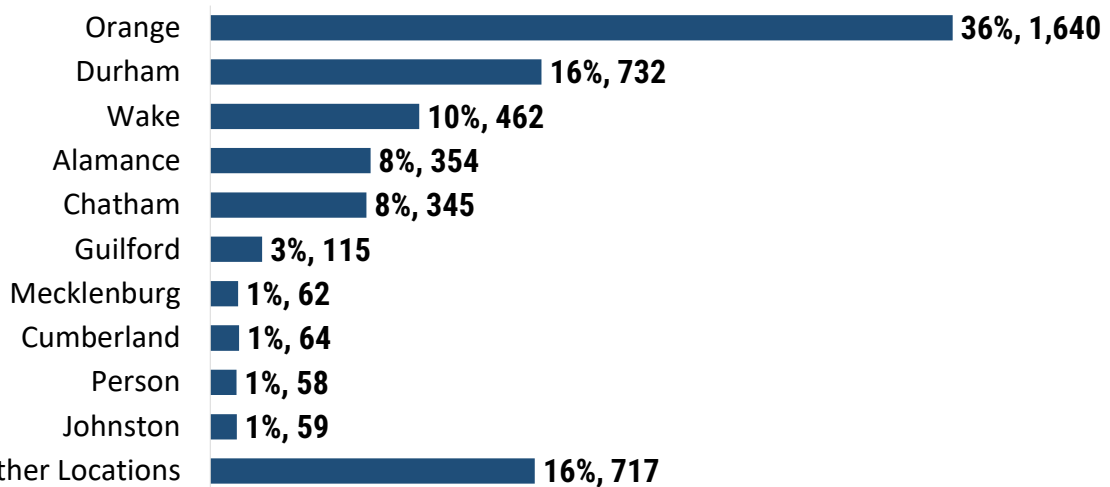


Source: U.S. Census Bureau LODES (OnTheMap)

191

Where do Carrboro's 4,608 Workers Live?

The people who work in Carrboro, by county of residence, 2019

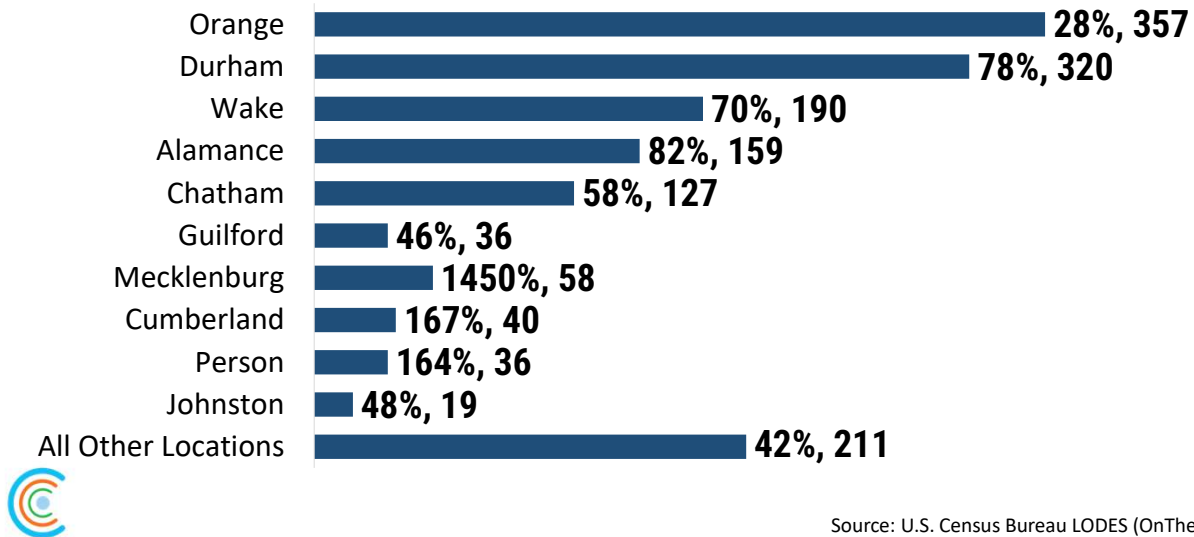


Source: U.S. Census Bureau LODES (OnTheMap)

192

Change in Where Carrboro Workers Live 2009 to 2019

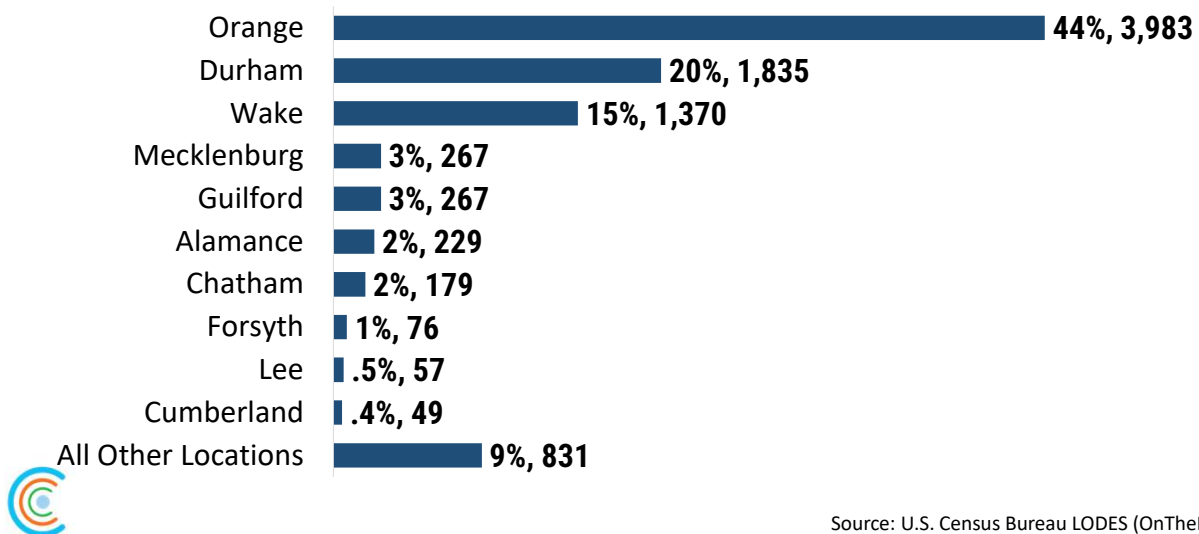
Change in where the people who work in Carrboro live, by county of residence, between 2009 and 2019



193

Where do Carrboro's 9,143 Working Residents Work? 44% Stay in Orange County and 56% Commute Out

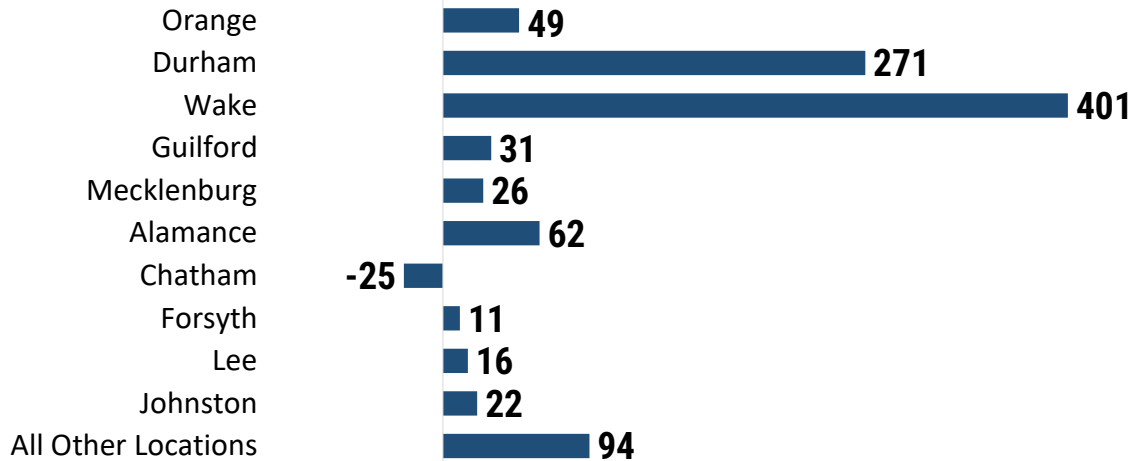
Location of primary job for Carrboro residents, 2019



194

Change in Where Carrboro Residents Work, 2009 to 2019

Change in location of Carrboro residents' primary job between 2009 and 2019

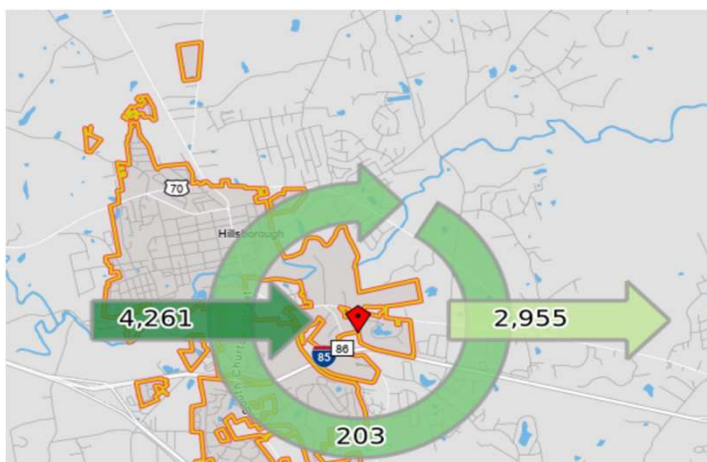


Source: U.S. Census Bureau LODS (OnTheMap)

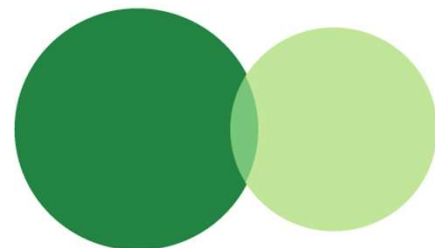
195

Hillsborough Worker Inflows/Outflows, 2019

4,261 drive in, 2,995 drive out, and 203 live and work in Hillsborough



Inflow/Outflow Job Counts in 2019



4,261 - Employed in Selection Area, Live Outside
 2,955 - Live in Selection Area, Employed Outside
 203 - Employed and Live in Selection Area

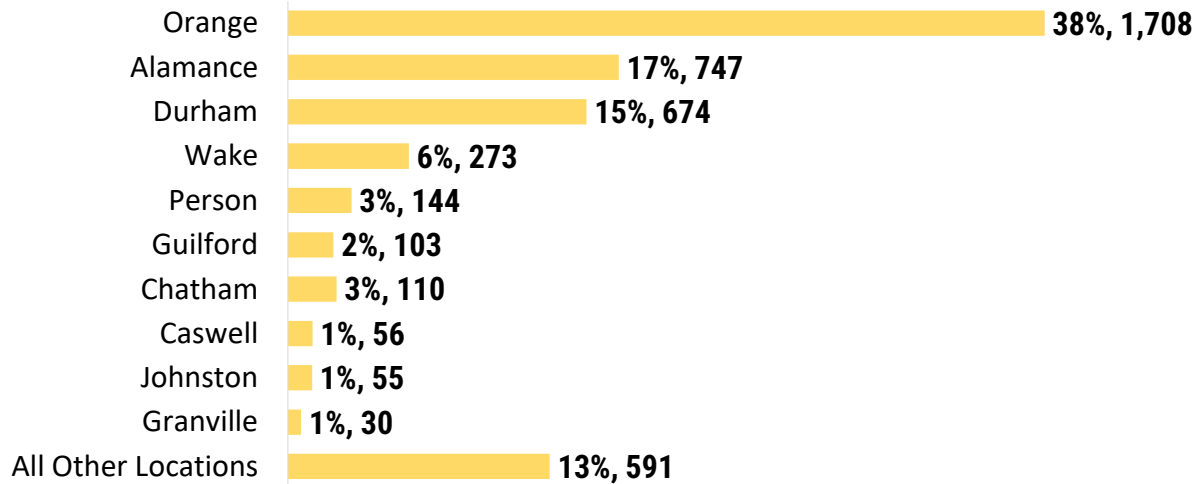


Source: U.S. Census Bureau LODS (OnTheMap)

196

Where do Hillsborough's 4,464 Workers Live?

The people who work in Hillsborough, by county of residence, 2019

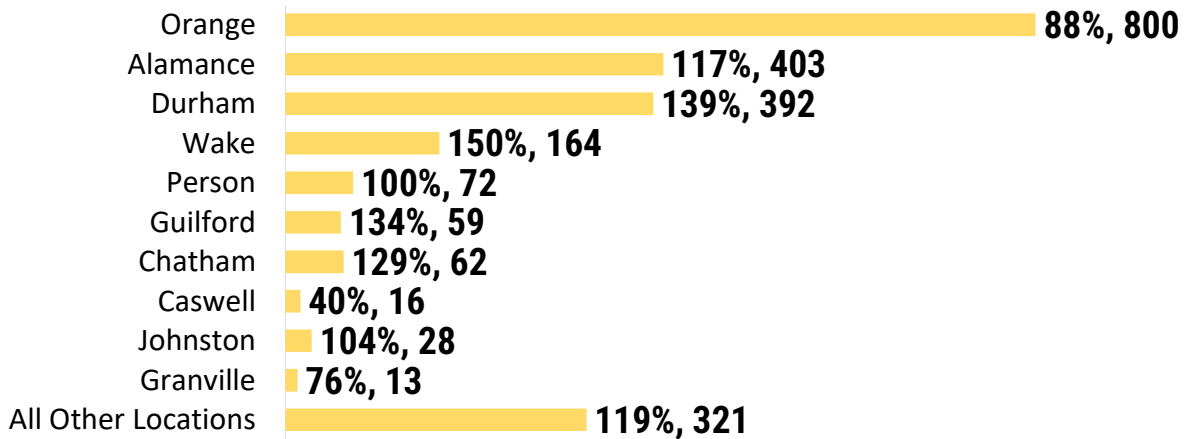


Source: U.S. Census Bureau LODS (OnTheMap)

197

Change in Where Hillsborough Employees Live 2009 to 2019

Change in where the people who work in Hillsborough live, by county of residence, between 2009 and 2019

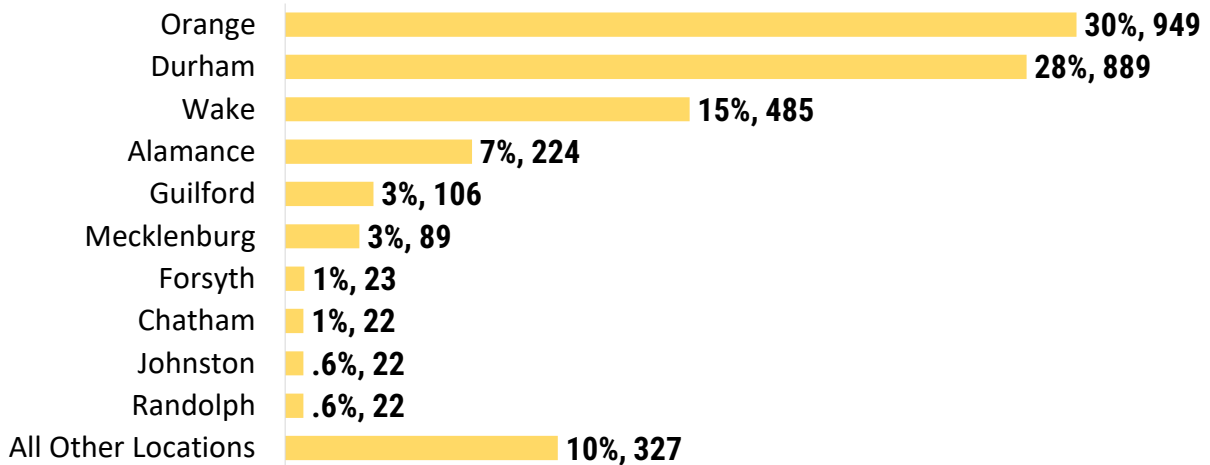


Source: U.S. Census Bureau LODS (OnTheMap)

198

Where do Hillsborough's Working Residents Go To Work? 70% Commuting Outside of Orange County

Location of primary job for Hillsborough's 3,158 working residents, 2019

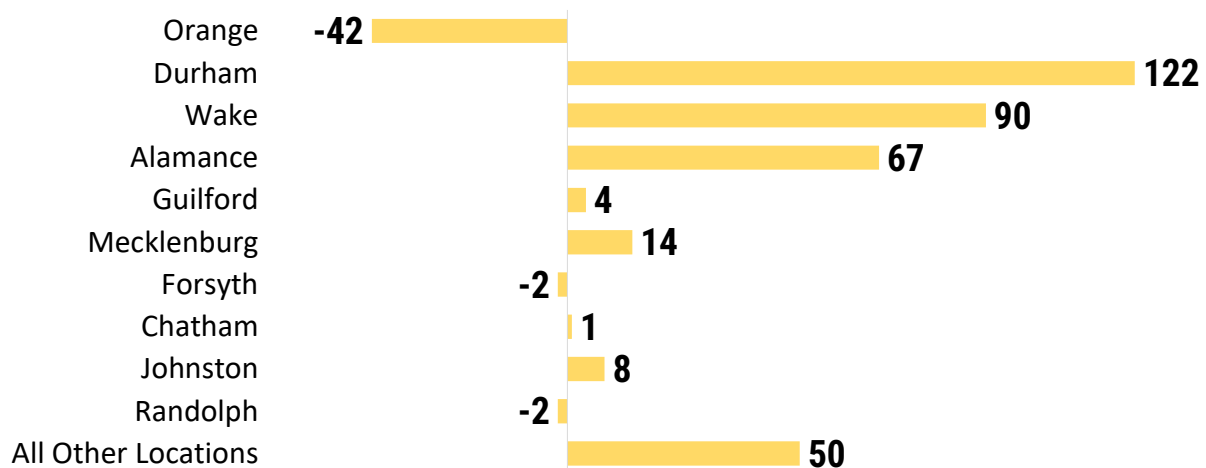


Source: U.S. Census Bureau LODS (OnTheMap)

199

More Hillsborough Residents Commuting to Wake, Durham, and Alamance Than in 2009

Change in location of Hillsborough residents' primary job, 2009-2019

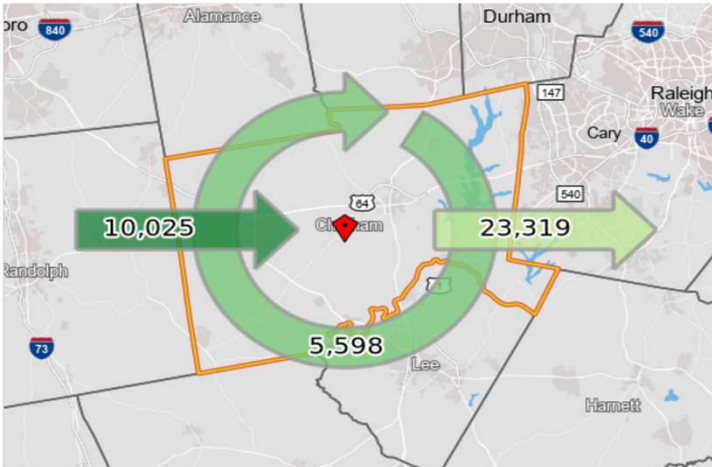


Source: U.S. Census Bureau LODS (OnTheMap)

200

Chatham County Worker Inflows/Outflows, 2019

10,025 drive in, 23,319 drive out, and 5,598 live and work in Chatham



Inflow/Outflow Job Counts in 2019

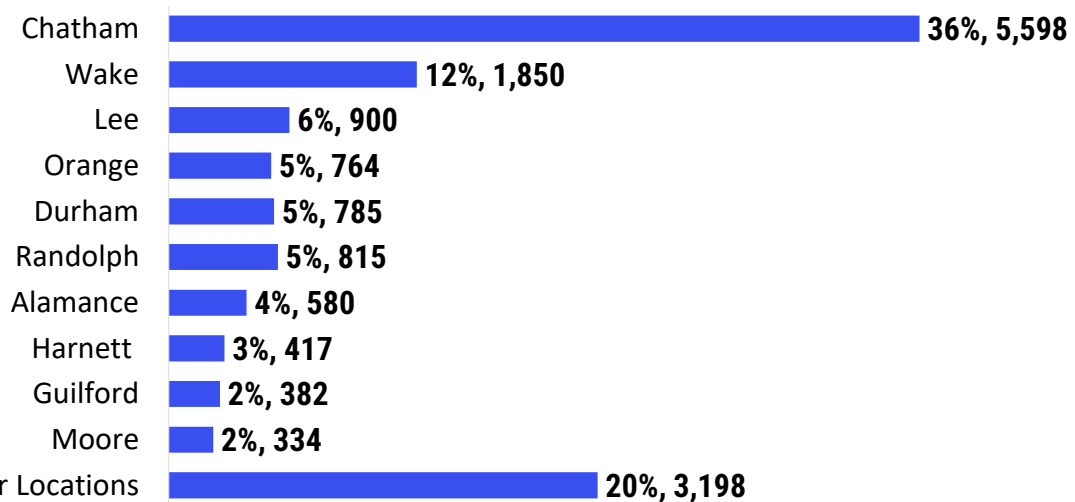


Source: U.S. Census Bureau LODS (OnTheMap)

201

Where do Chatham County's 15,623 Workers Live?

The people who work in Chatham County, by county of residence, 2019

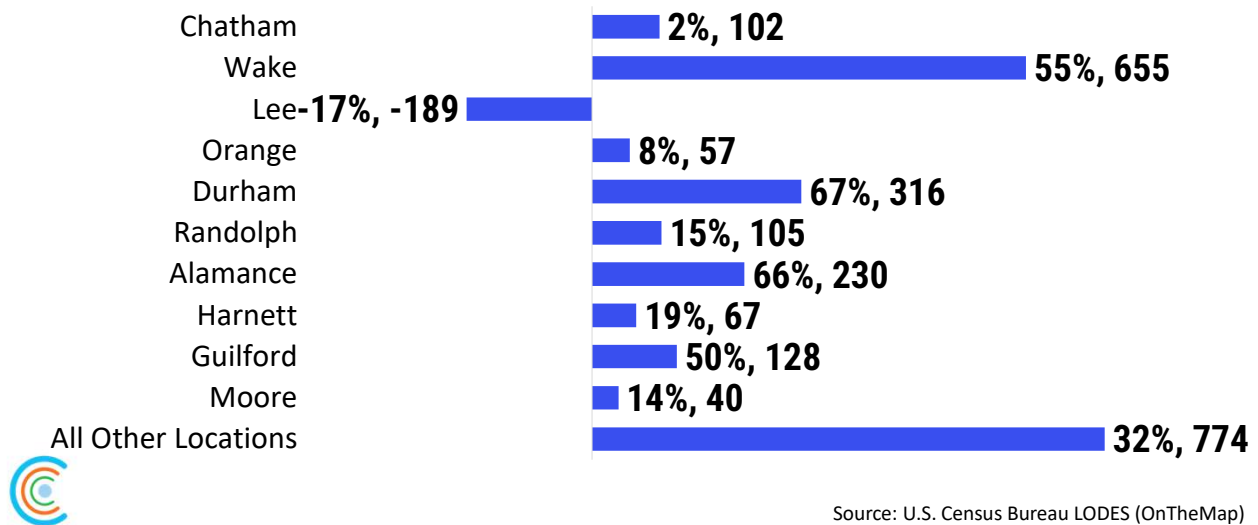


Source: U.S. Census Bureau LODS (OnTheMap)

202

Change in Where Chatham Workers Commute From 2009 to 2019

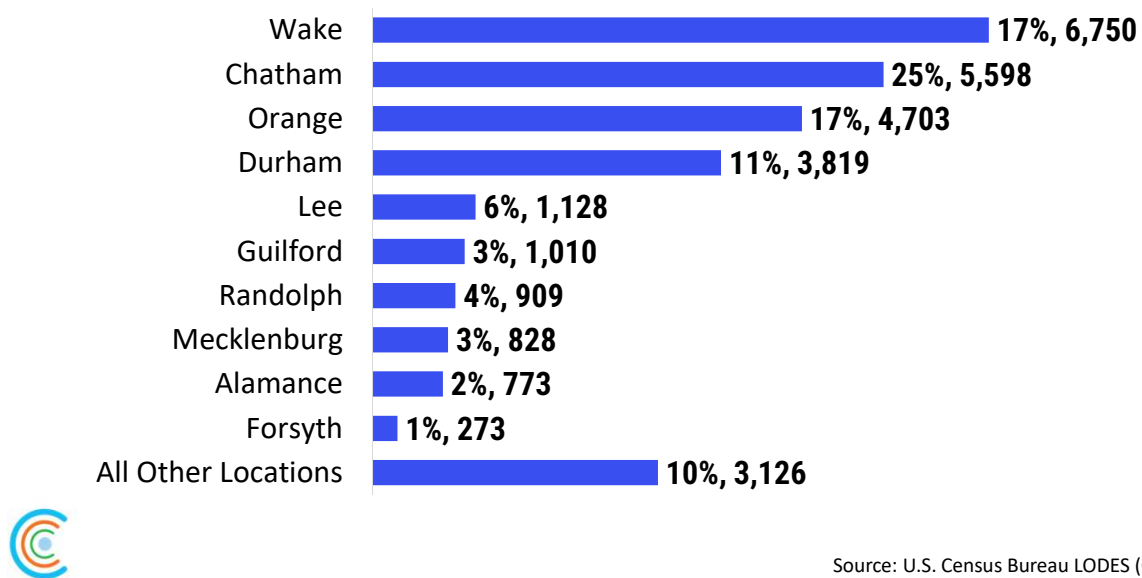
Change in where the people who work in Chatham County live by county of residence, between 2009 and 2019



203

Where do Chatham County's 28,917 Working Residents Work?

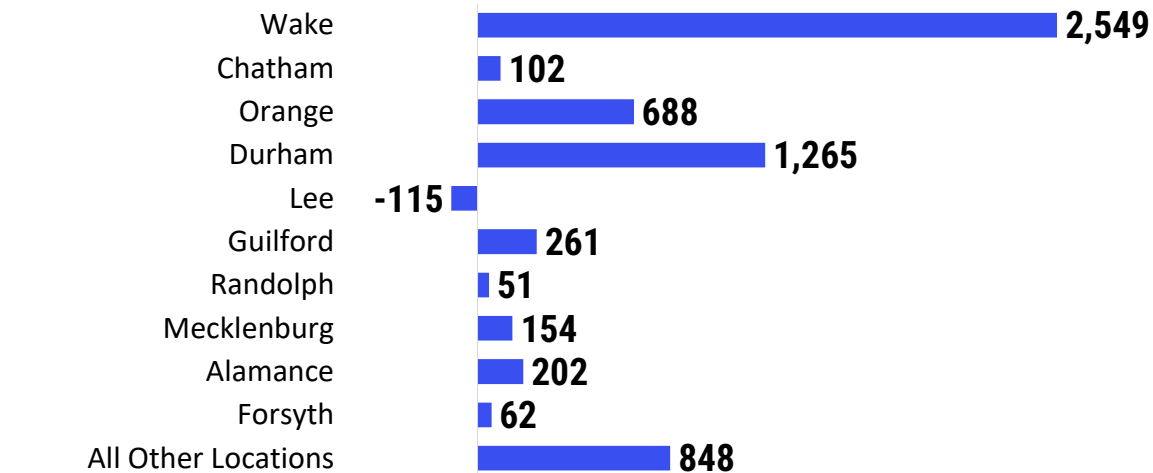
Location of primary job for Chatham County residents, 2019



204

Change in Where Chatham County Residents Work 2009 to 2019

Change in location of Chatham County residents' primary job between 2009 and 2019

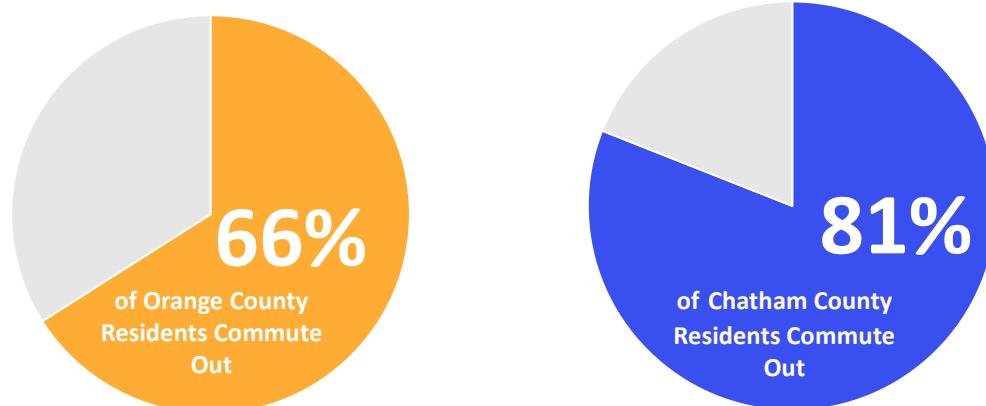


Source: U.S. Census Bureau LODES (OnTheMap)

205

Majority of Orange and Chatham Residents Work Outside the County In Which They Live

Percent of residents commuting outside of the county for work, 2019

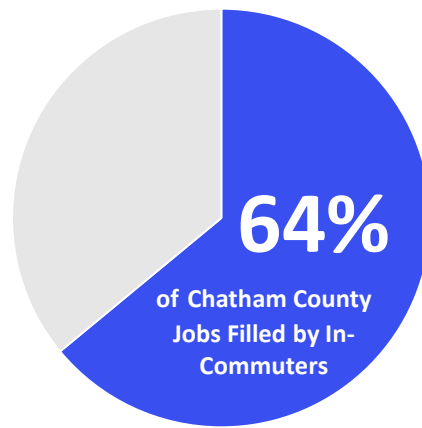
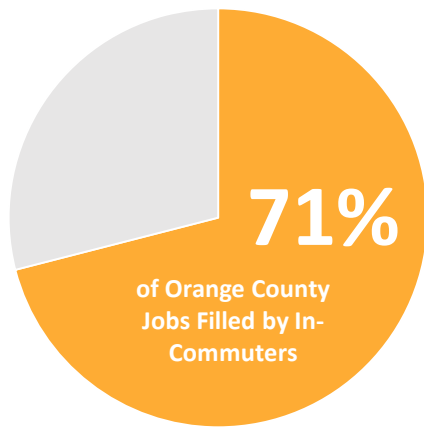


Source: U.S. Census Bureau LODES (OnTheMap)

206

Most Orange and Chatham County Jobs Filled by In-Commuters

Percent of county jobs filled by in-commuters, 2019



Source: U.S. Census Bureau LODES (OnTheMap)

207

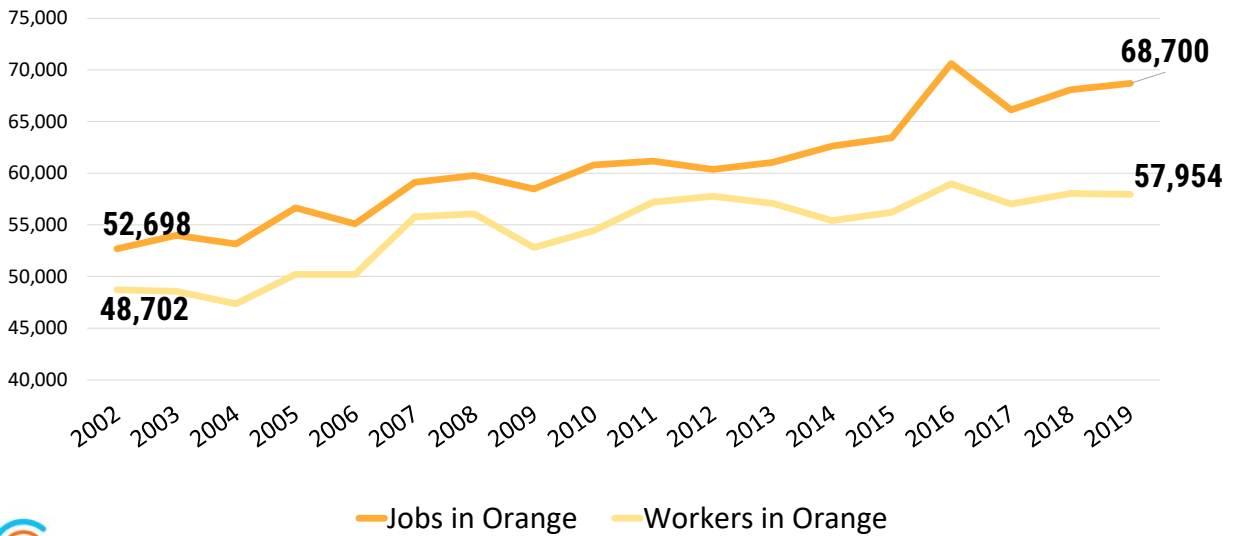
Jobs and Workers



208

Orange County Has 10,500 More Jobs Than Workers

Jobs in Orange County compared with workers living in Orange County from 2002 to 2019

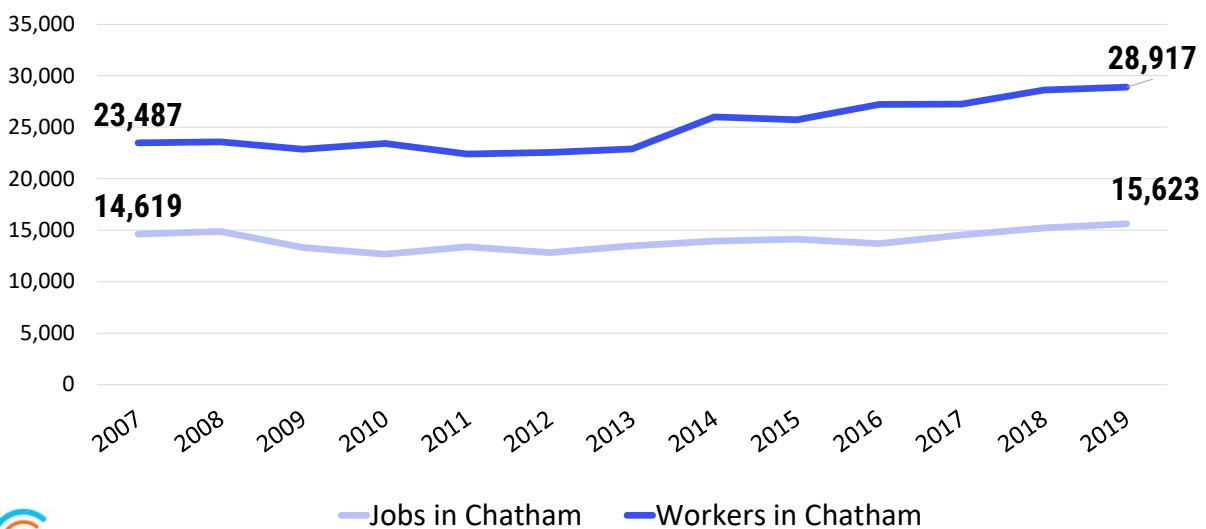


Source: U.S. Census Bureau LODS (OnTheMap)

209

Chatham County Has 14,000 More Workers Than Jobs

Jobs in Chatham County compared with workers living in Chatham County from 2007 to 2019

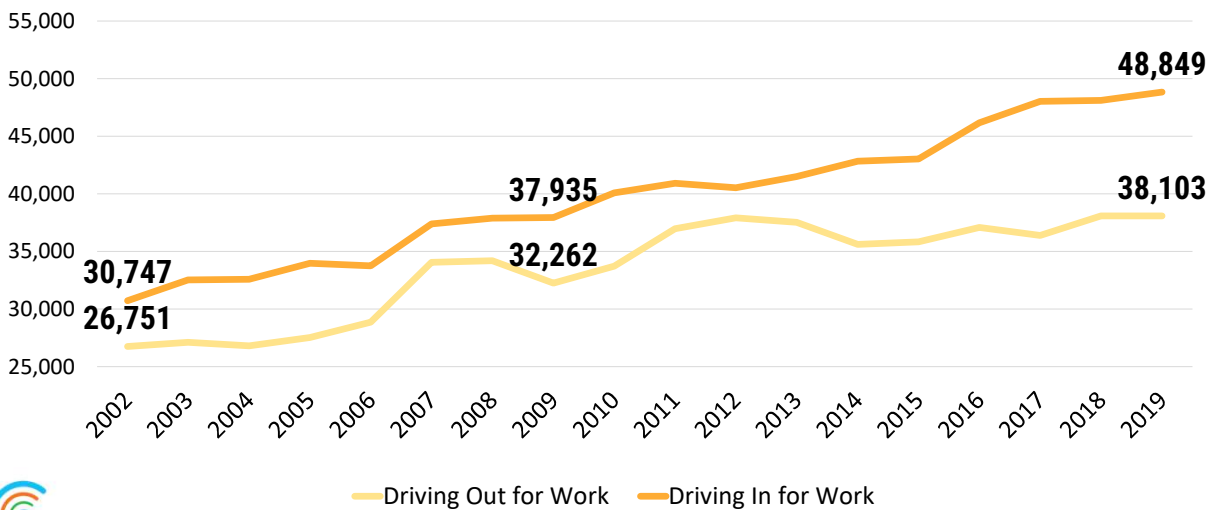


Source: U.S. Census Bureau LODS (OnTheMap)

210

Number Driving Into Orange County for Work Growing Faster Than Those Driving Out for Work

Number of Orange County residents driving out for work vs. Orange County workers driving in

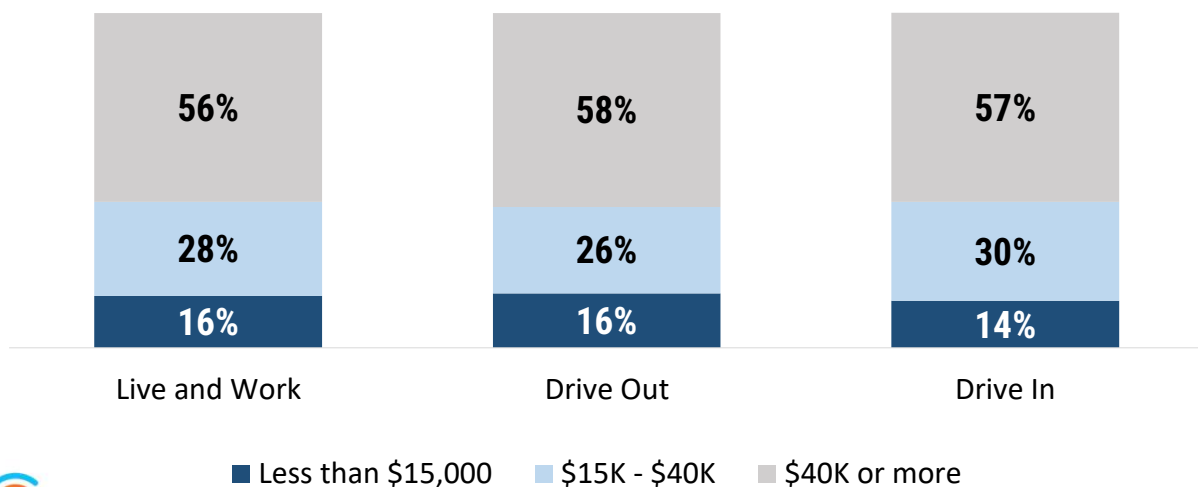


Source: US Census Bureau, LODES

211

Few Differences in Earnings by Place of Work and Residence for Orange County

Orange County worker ins and outs by annual earnings, 2019

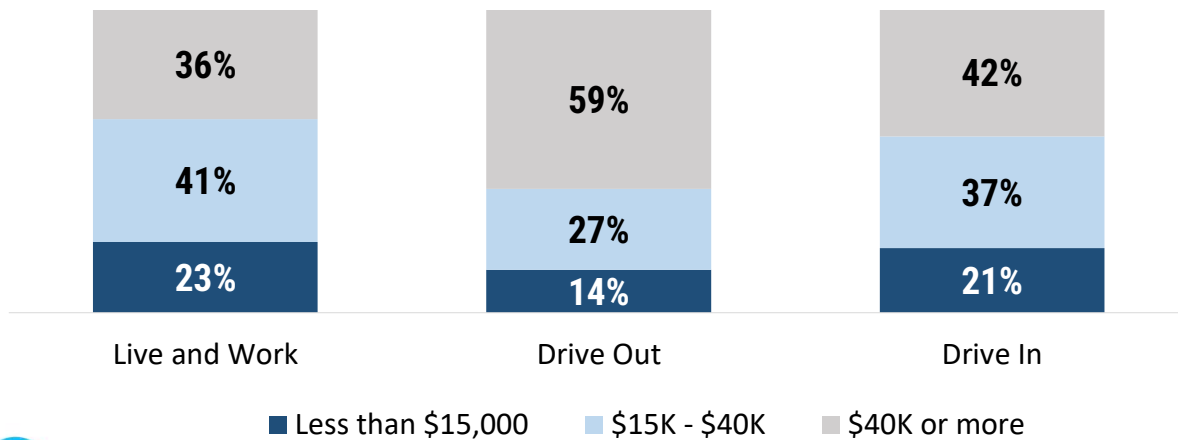


Source: U.S. Census Bureau LODES (OnTheMap)

212

Chatham Out-Commuters More Likely to Earn >\$40k; Workers Who Live and Work in Chatham Earn Least

Chatham County worker ins and outs by annual earnings, 2019

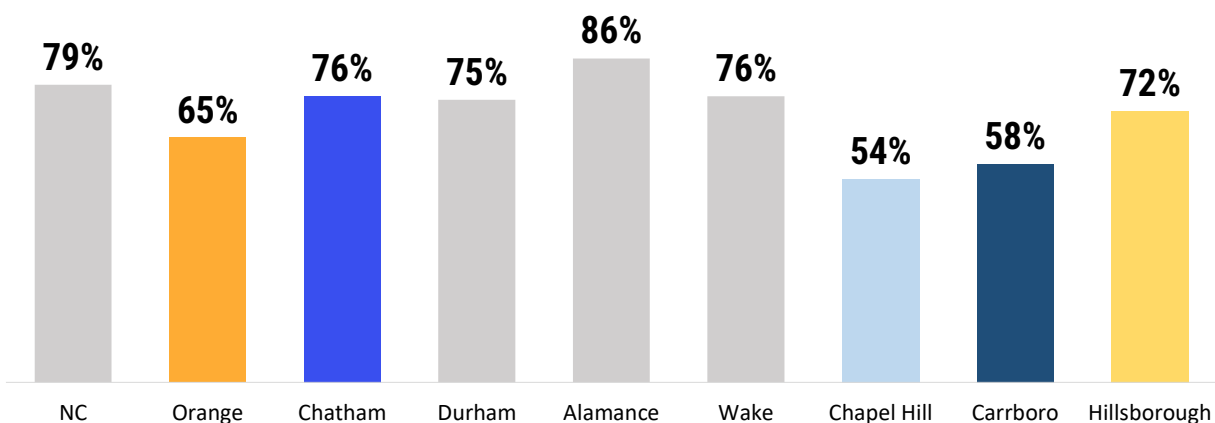


Source: U.S. Census Bureau LODS (OnTheMap)

213

Chapel Hill Workers Least Likely to Drive Alone to Work

Percent of workers aged 16 and over driving to work alone, 2016-20

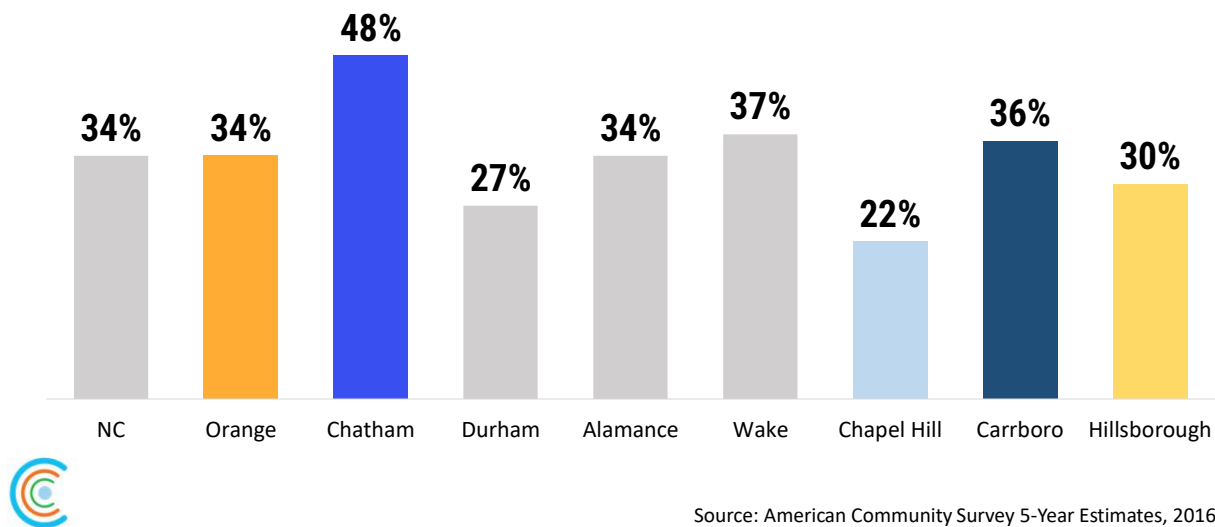


Source: American Community Survey 5-Year Estimates, 2016-20

214

48% of Chatham Workers Driving Alone Travel 30+ Minutes

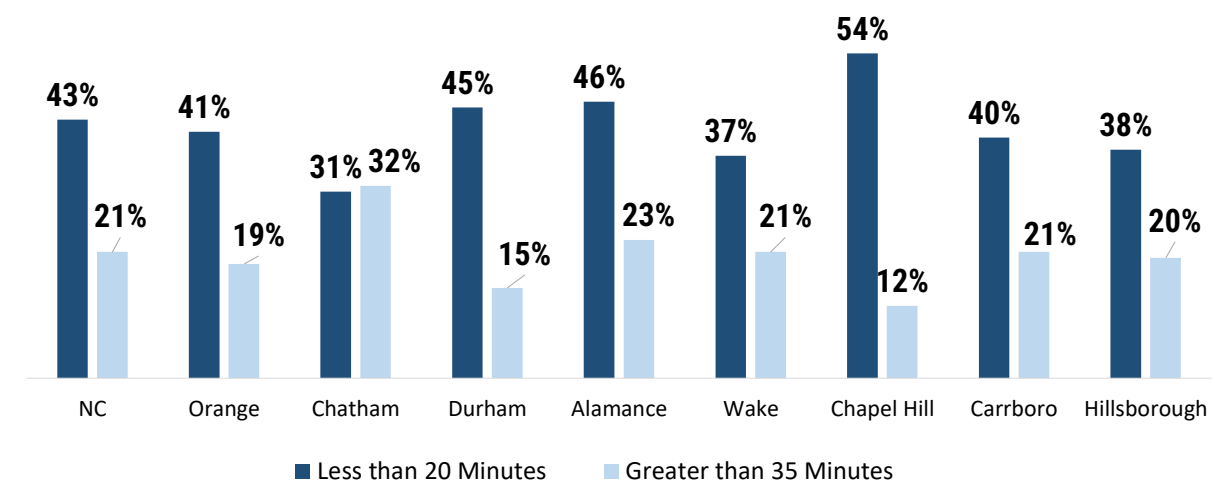
Percent of workers that drive alone and have a 30+ min commute, 2016-20



215

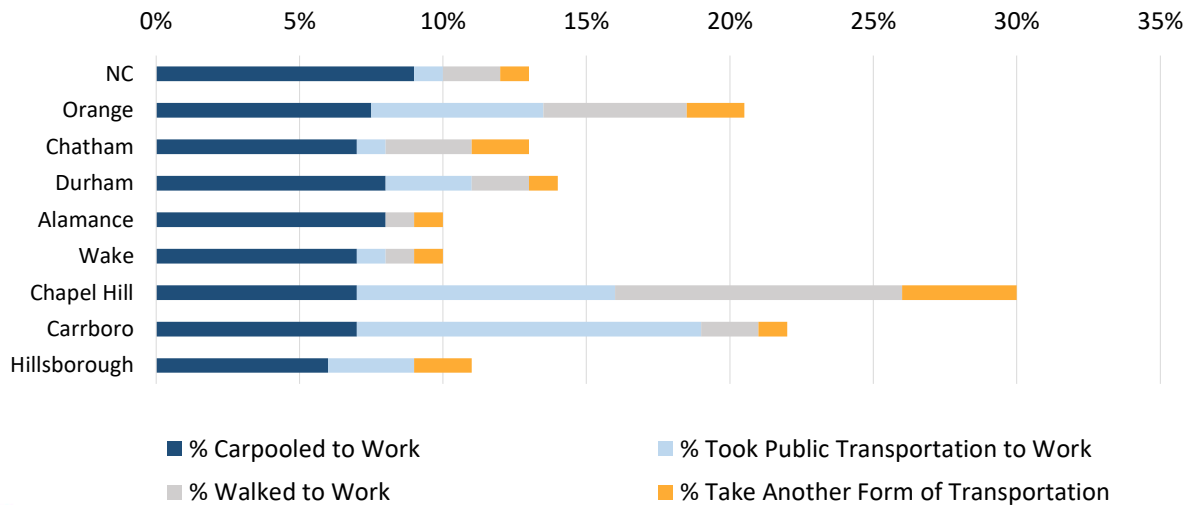
54% of Chapel Hill Workers Commute Less than 20 Minutes

Average commute length in minutes



216

Chapel Hill and Carrboro Lead in Commuting By Doing Something Other than Driving Alone



Source: American Community Survey 5-Year Estimates, 2016-20

217

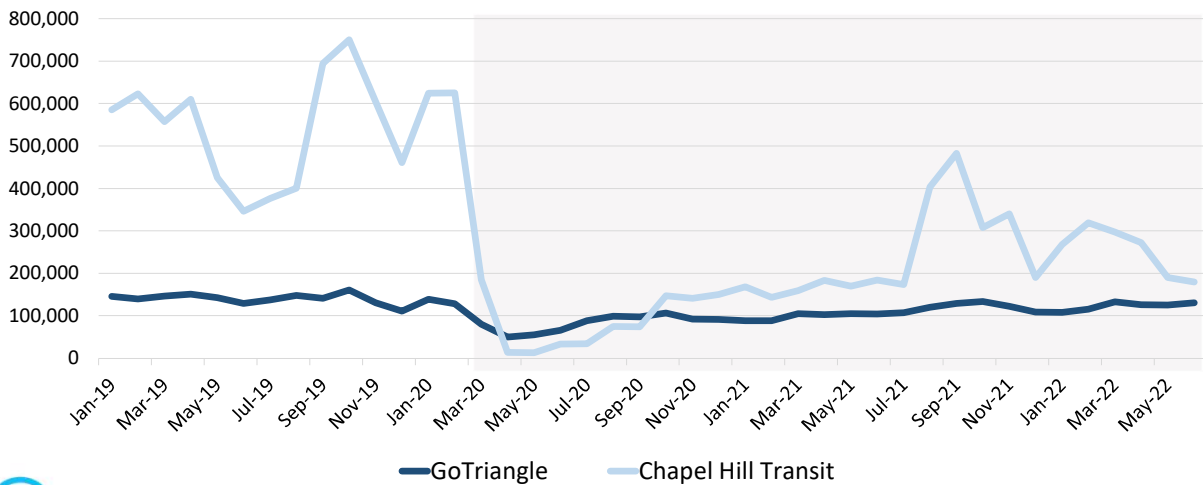
Transit



218

Pandemic Restrictions, University Operations, and Changing Work Habits Have Big Impact on CHT Ridership

Monthly ridership January 2019 through June 2022

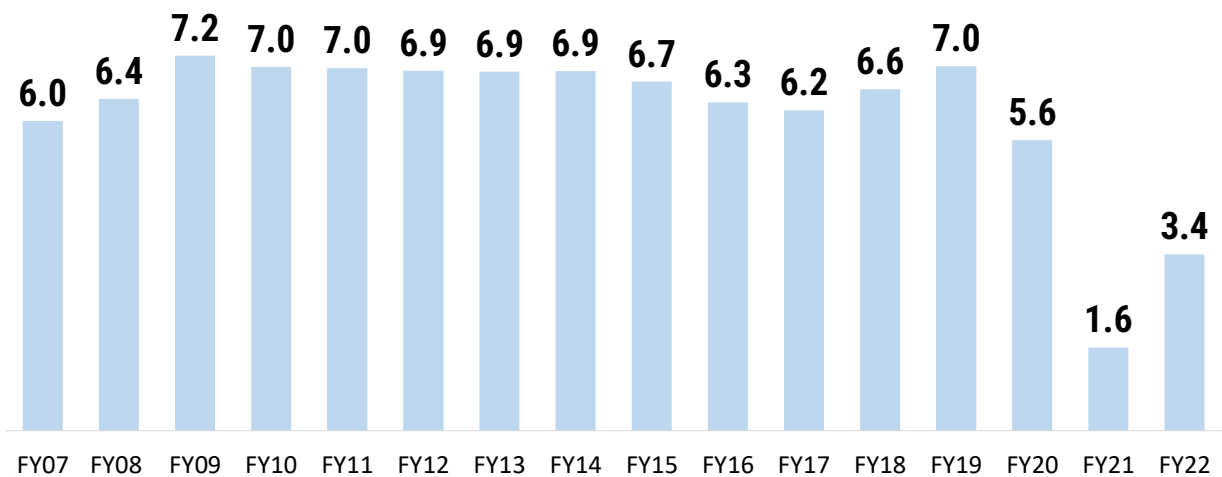


Source: Chapel Hill Transit; GoTriangle

219

Chapel Hill Transit Ridership Rebounds, But Well Below 2019 Peak

Annual Chapel Hill Transit ridership from FY2007 to FY2022 (in millions)

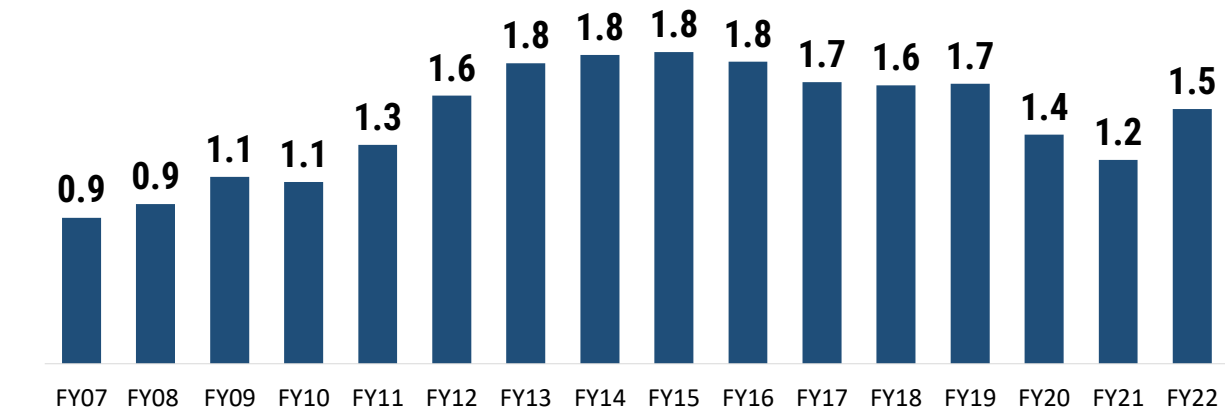


Source: Chapel Hill Transit

220

2022 GoTriangle Ridership Approaches Pre-Pandemic Levels

Annual GoTriangle ridership from FY2007 to FY2022 (in millions)

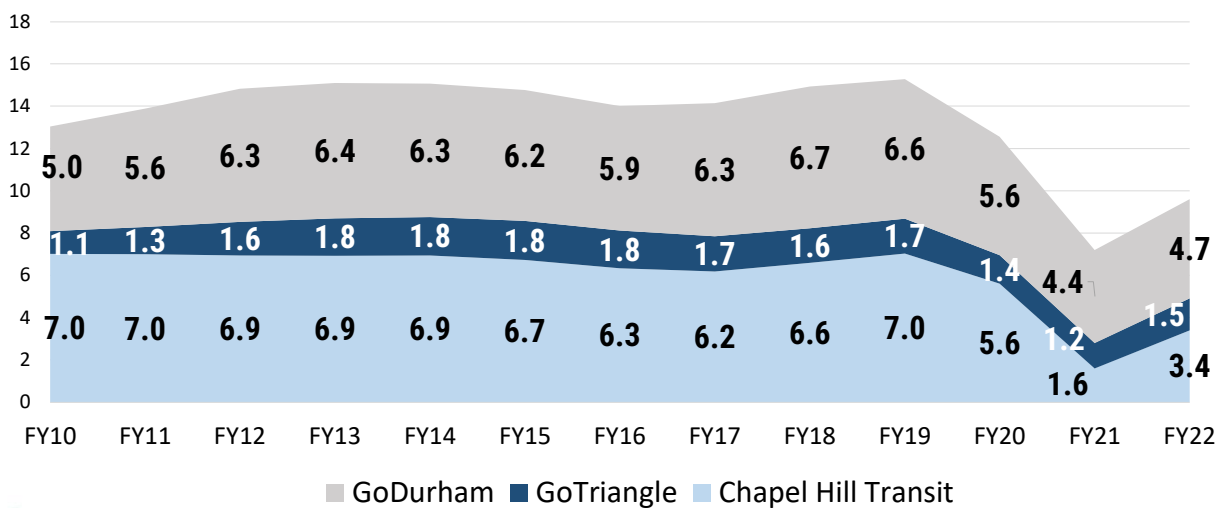


Source: GoTriangle

221

Regional Transit Ridership Improving After Sharp Declines

Regional Transit Ridership (in millions) FY2010 to FY2022



Source: Chapel Hill Transit, GoTriangle

222

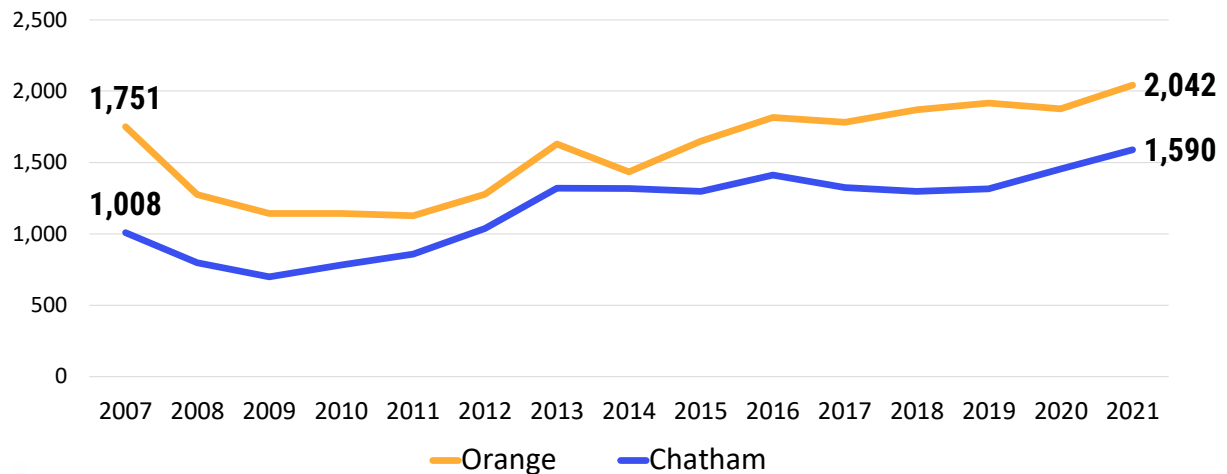
Housing (For Sale)



223

Annual Home Sales Rise in 2021

Annual home sales in Orange and Chatham County from 2007 to 2021

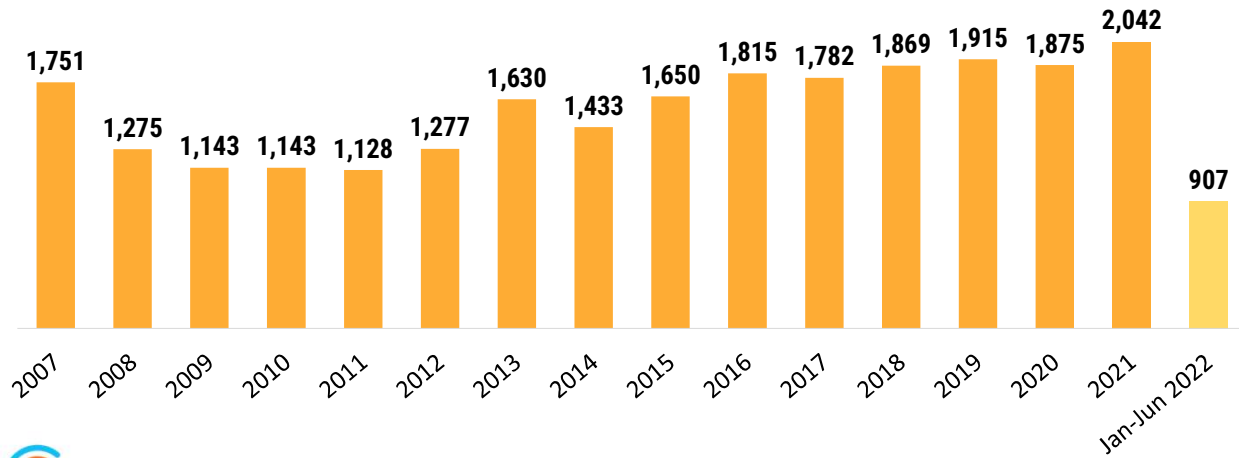


Source: Triangle MLS and Allen Tate Realtors

224

Orange County Home Sales Rise in 2021

Annual home sales, 2007-June 2022

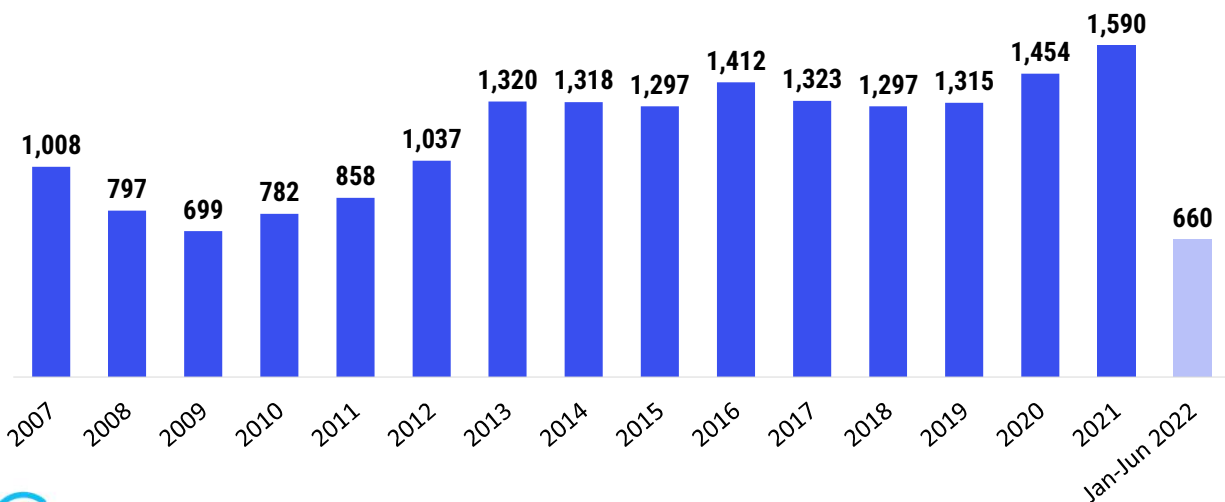


Source: Triangle MLS and Allen Tate Realtors

225

Chatham Home Sales Jump 9% in 2021, on Pace for a Slower 2022

Annual home sales, 2007 – June 2022

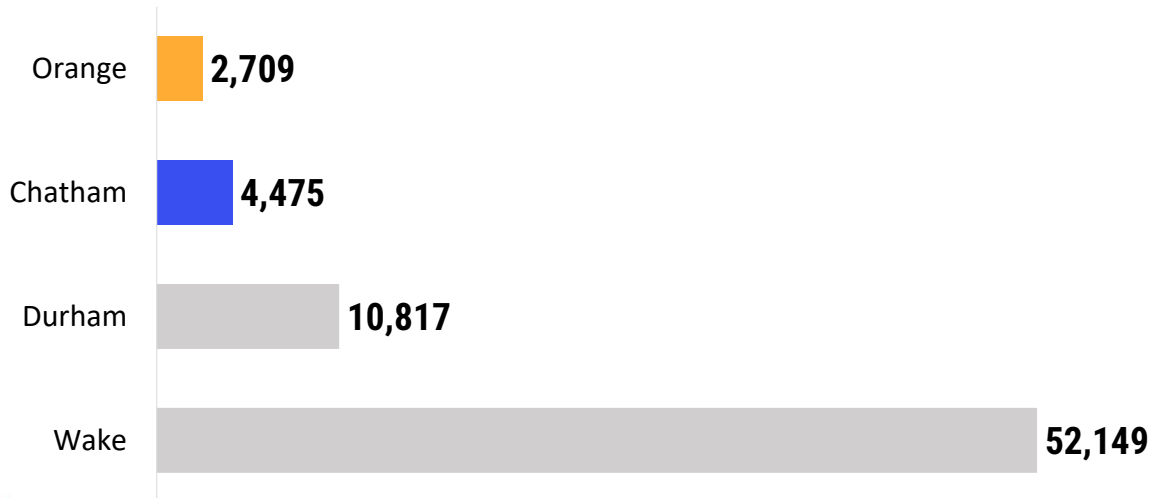


Source: Triangle MLS and Allen Tate Realtors

226

New, For-Sale Homes Sold Between 2010 and June 2022

New for-sale housing units built between 2010 and June 2022

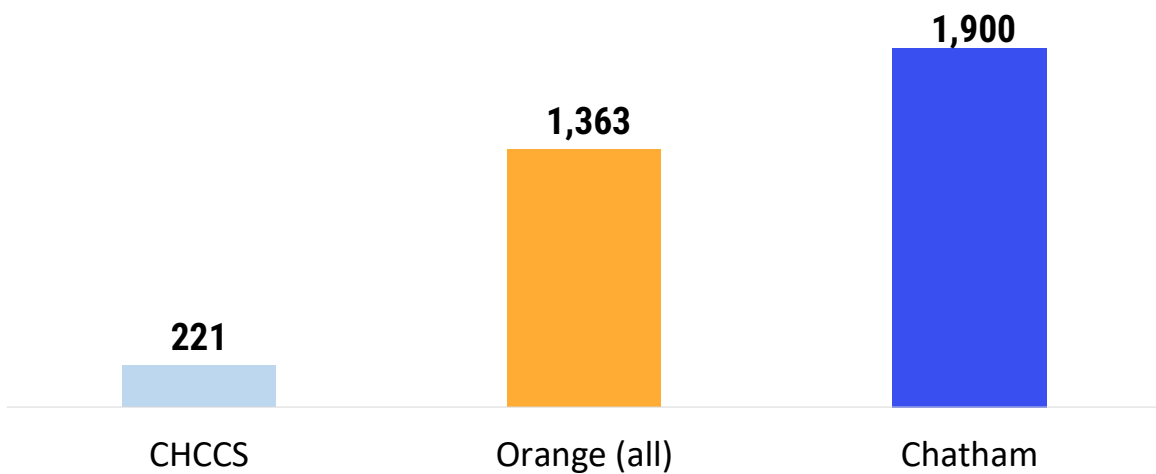


Source: Triangle MLS and Allen Tate Realtors

227

Chatham Leads in New Construction Sales Since January 2018

New construction homes listed and sold from January 2018 through June 2022

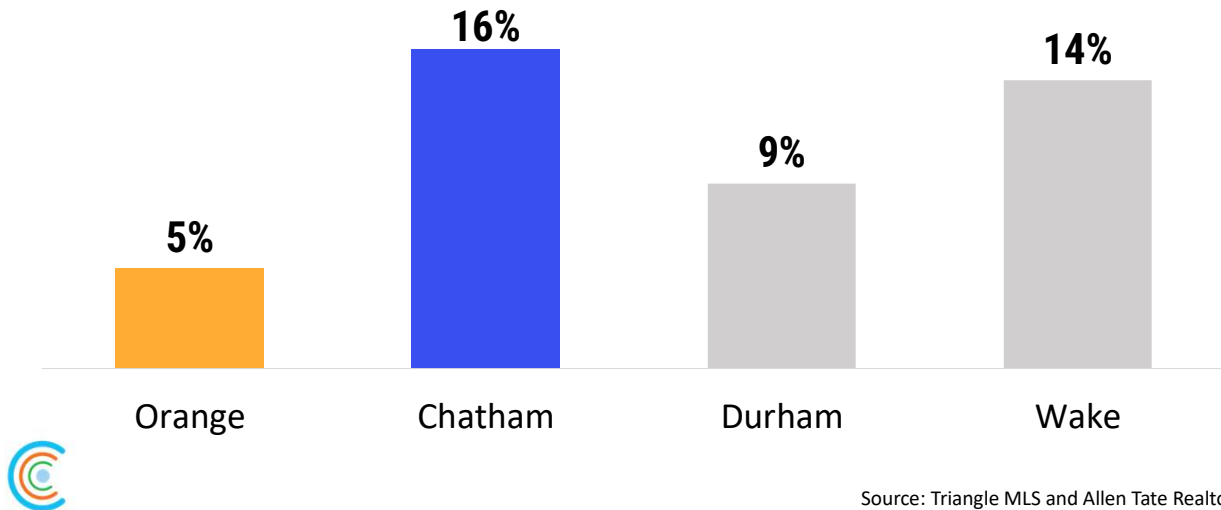


Source: Triangle MLS and Allen Tate Realtors

228

5% of Orange County Total Housing Stock Has Been Built Since 2010, 16% in Chatham

Percent of available housing units built since 2010



229

1987

Median year structure
built in Orange County

1993

Median year structure
built in Chatham County

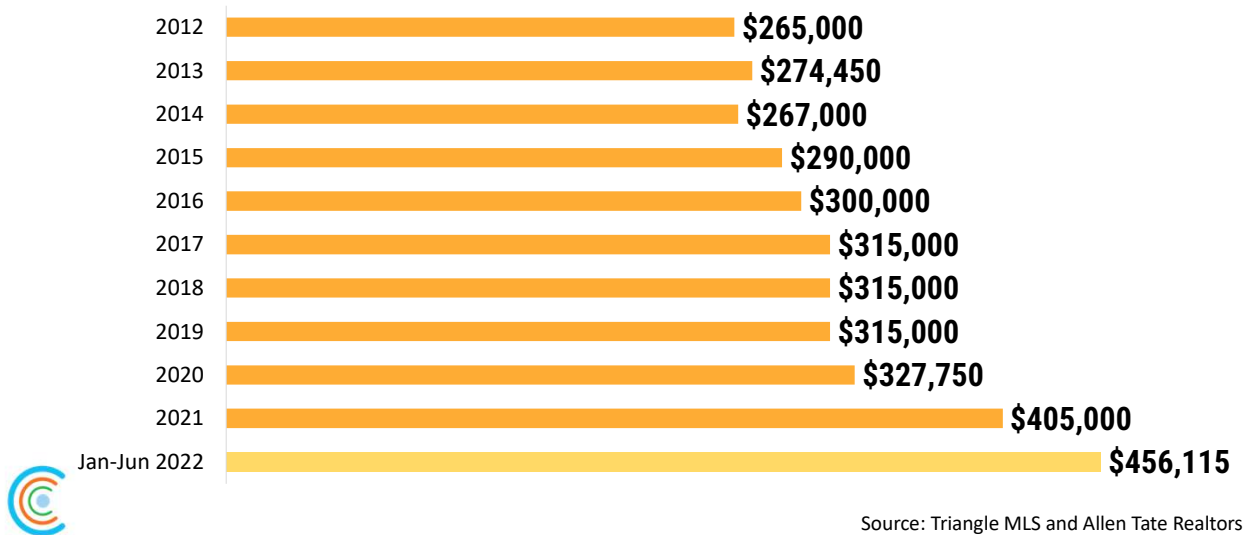


Source: American Community Survey 5-Year Estimates, 2016-20

230

Orange County Median Home Sales Price Increases by \$140,000 since 2019

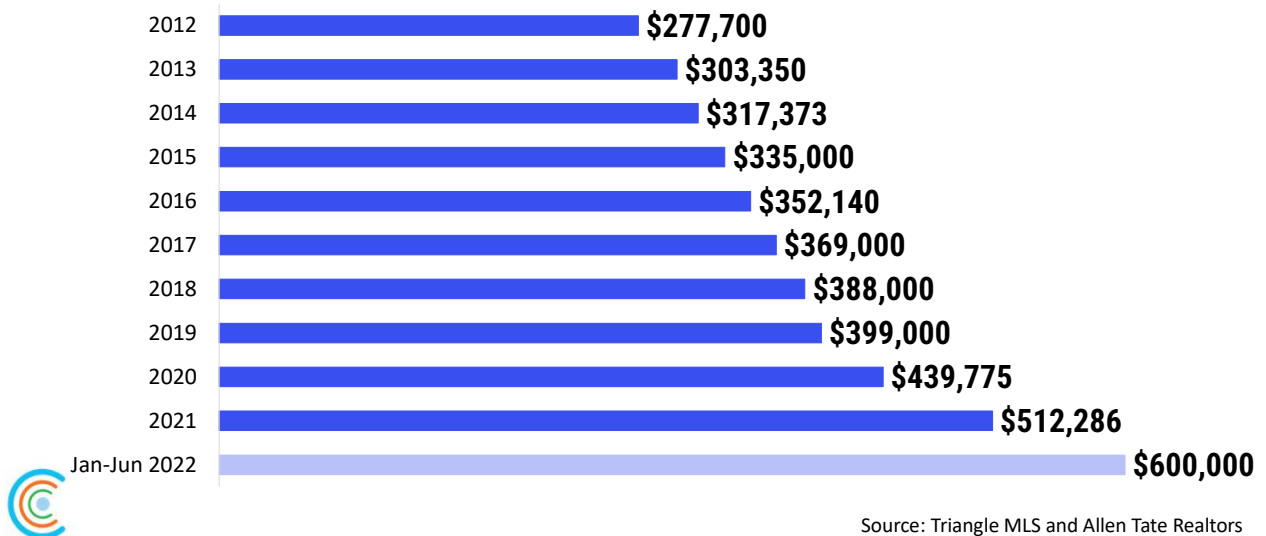
Orange County median home sales price, 2012 through June 2022



231

Chatham County Median Home Sales Price Increases by \$200k Since 2019

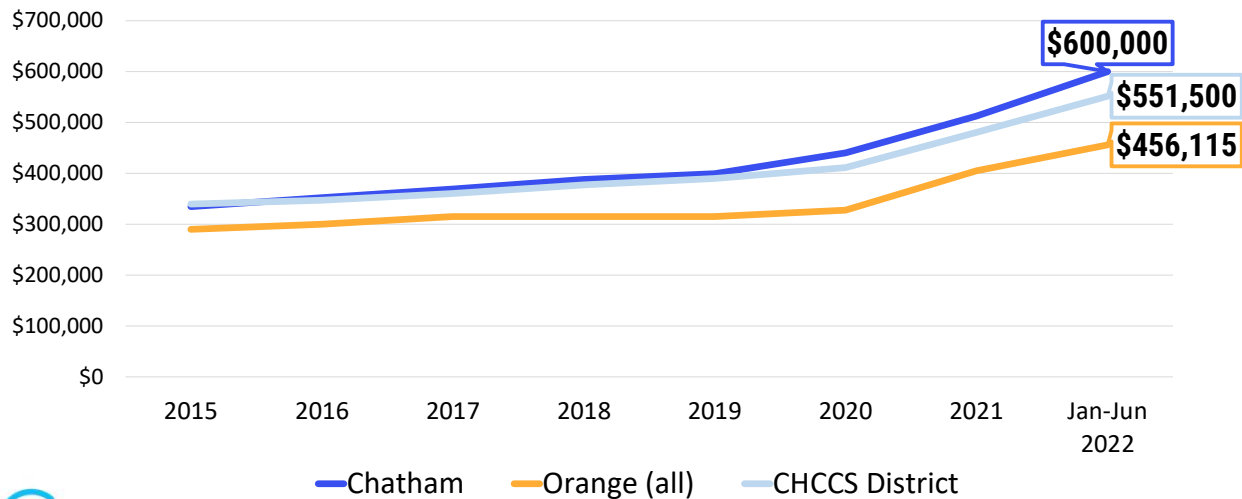
Chatham County median home sales price, 2012 through June 2022



232

Regional Homes Prices Grow Sharply Beginning in 2020

Median residential closing price, 2015 through June 2022

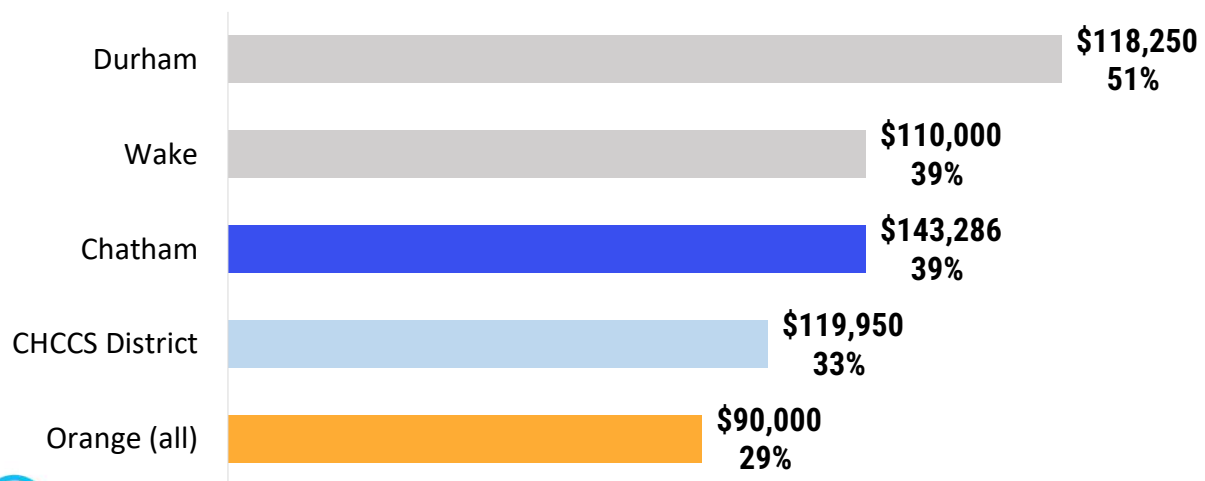


Source: Triangle MLS and Allen Tate Realtors

233

Five-Year Home Price Growth Led by Durham (51%) and Chatham (\$143,286)

Dollar and percent change in median home sales price from 2017 through 2021

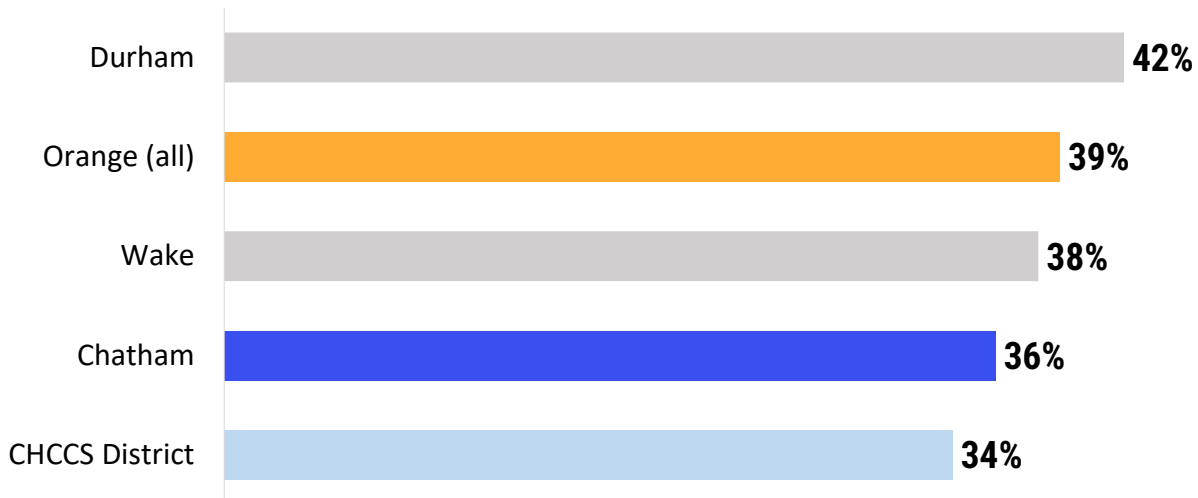


Source: Triangle MLS and Allen Tate Realtors

234

18-Month Home Price Growth Rate Led By Durham (42%)

Change in median home sale price, 2020 compared with Jan – June 2022

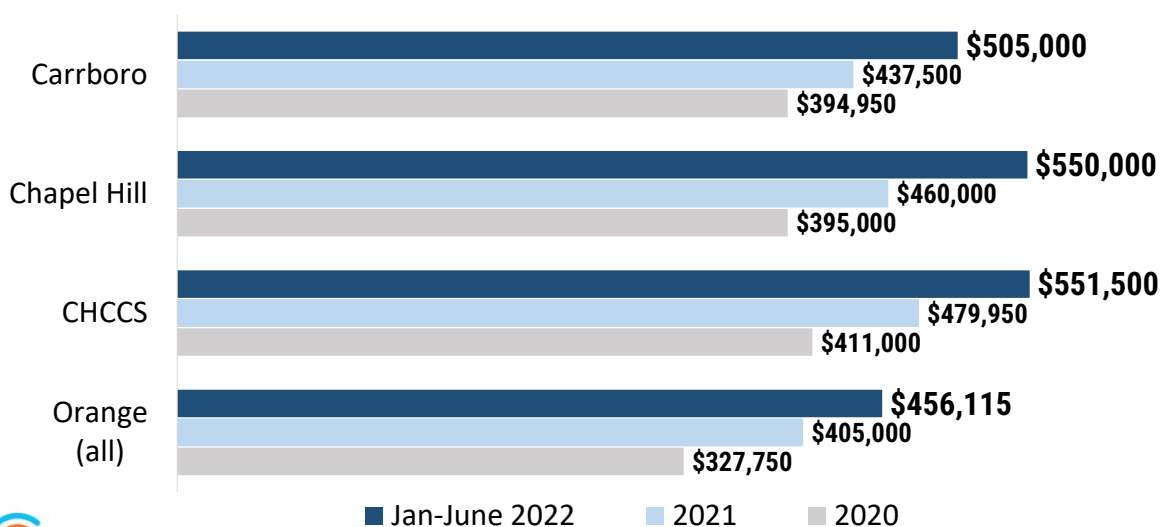


Source: Triangle MLS and Allen Tate Realtors

235

Carrboro, Chapel Hill, and CHCCS Homes Top \$500K

Median home sales price for the years 2020 and 2021 and the period Jan-June 2022

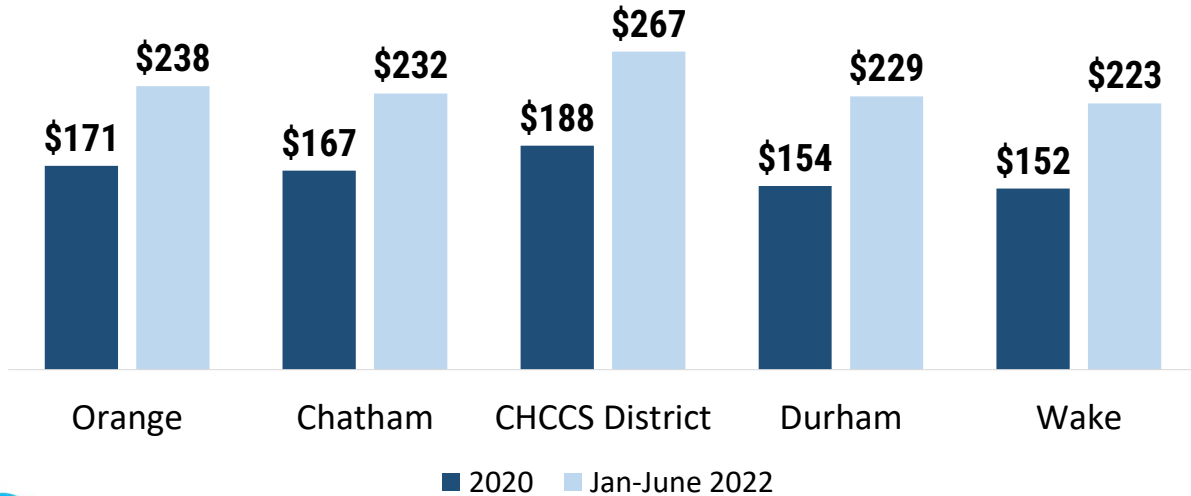


Source: Triangle MLS and Allen Tate Realtors

236

CHCCS Has Highest Price Per Square Foot

Median price per square foot (2020 vs Jan-Jun 2022)

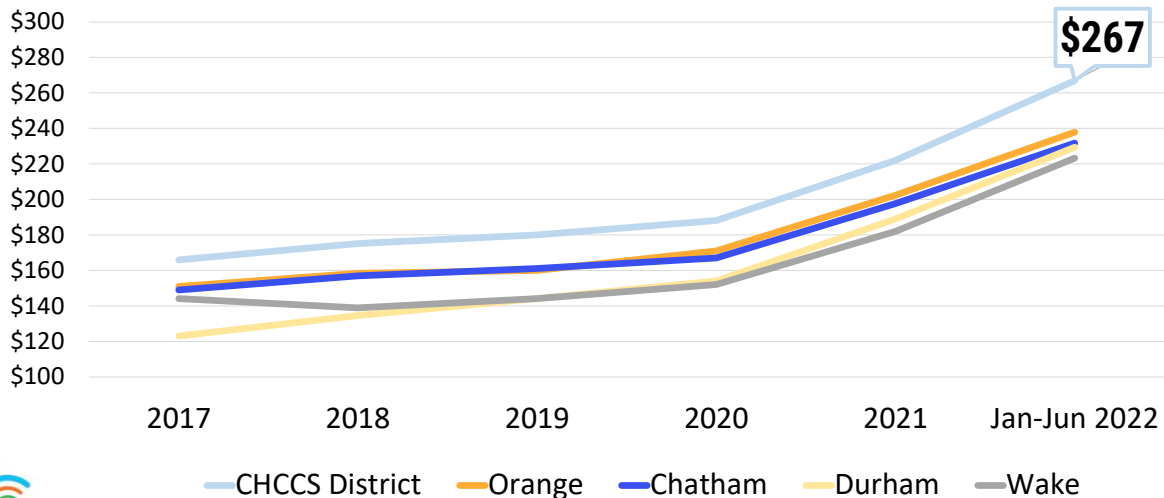


Source: Triangle MLS and Allen Tate Realtors

237

Homes in the Chapel Hill-Carrboro School District Continue to Demand the Highest Price Per Square Foot

Median residential price per square foot, 2017 through June 2022

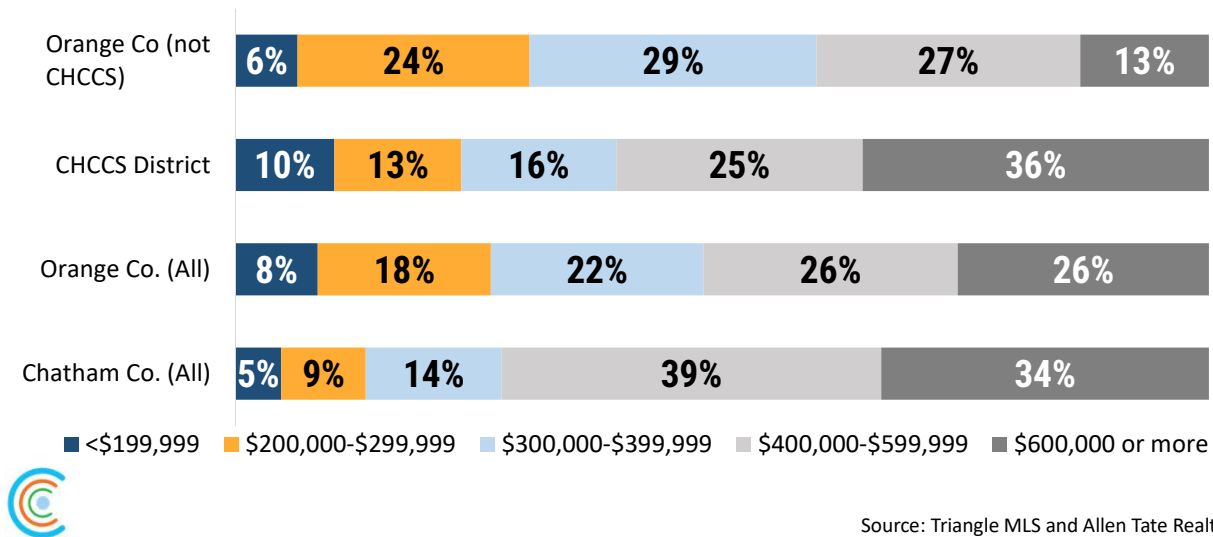


Source: Triangle MLS and Allen Tate Realtors

238

In 2021, 30% of Orange and 14% of Chatham Homes Sold for Less Than \$300,000

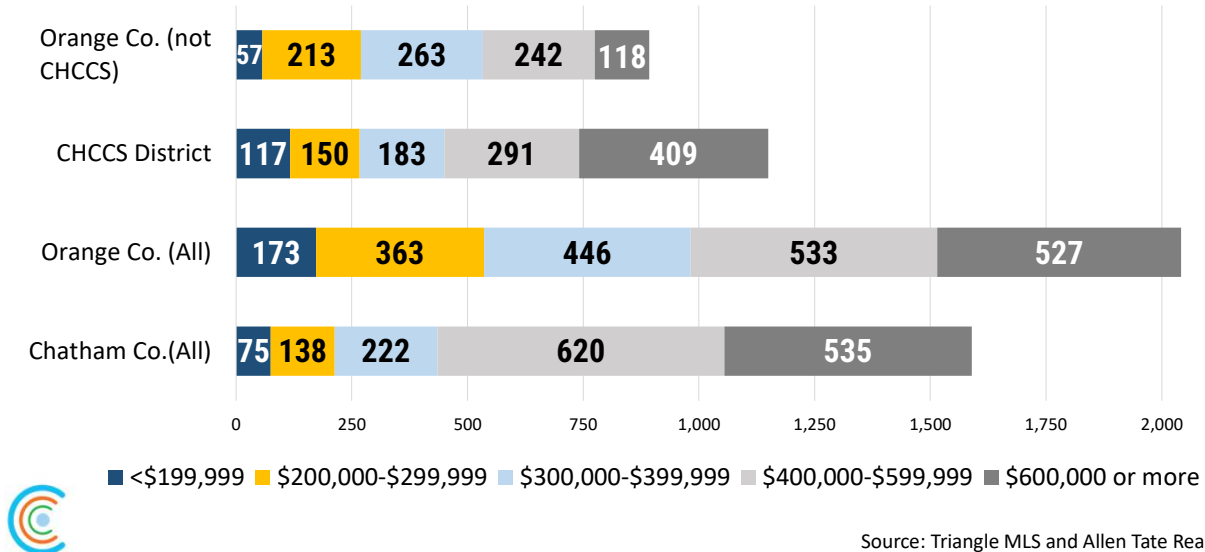
Percent of homes sold in 2021 by price bands



239

In 2021, 536 Homes in Orange and 213 in Chatham Sold for Less Than \$300,000

Number of homes sold in 2021 by price bands



240

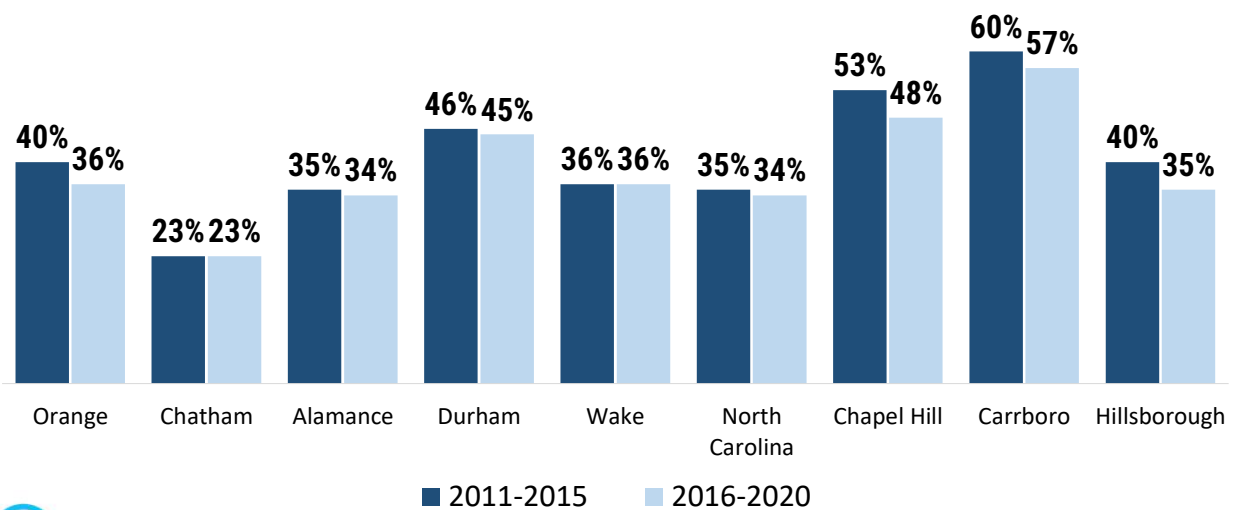
Housing (For Rent)



241

Percent of Residents Renting Declining

Share of renter-occupied households, 2011-15 vs. 2016-20

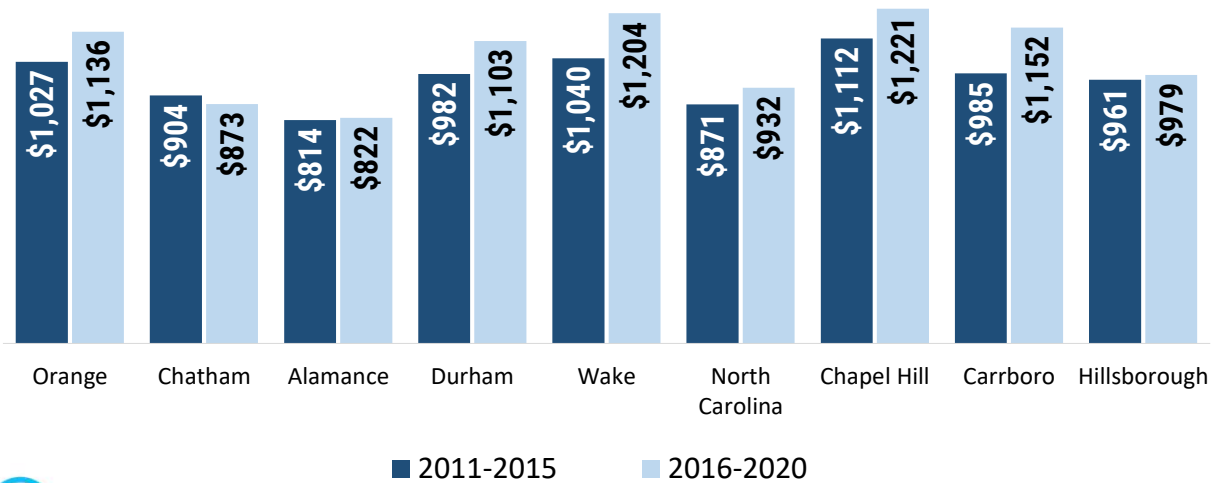


Source: American Community Survey 5-Year Estimates, 2011-15 & 2016-20

242

Median Rent Up in Most Places Except Chatham

Median rent, 2011-15 vs. 2016-20

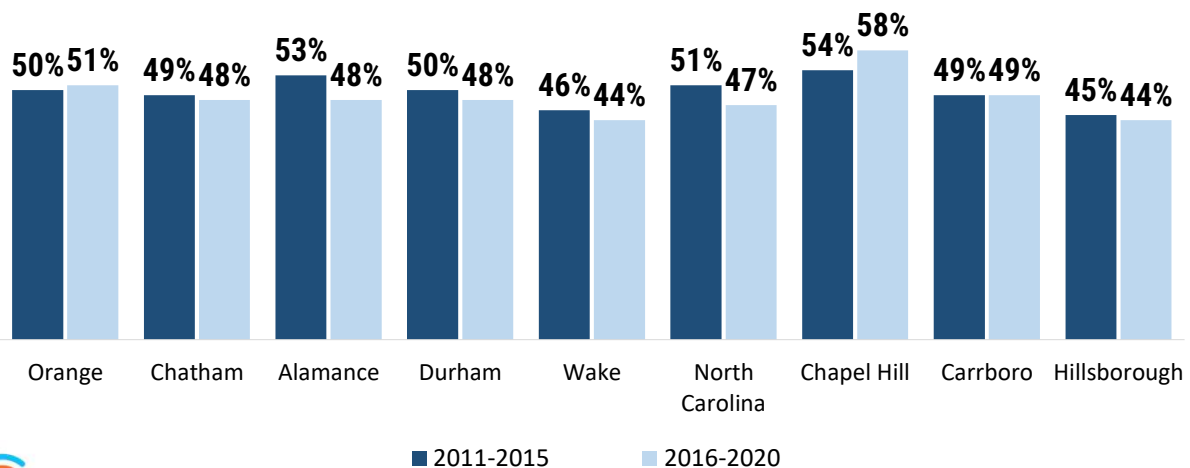


Source: American Community Survey 5-Year Estimates, 2011-15 & 2016-20

243

Cost-Burdened Renters (>30% income on rent) Up in Orange Communities, Declining Elsewhere

Percent of 'cost-burdened' households (spending greater than 30% of household income on rent) 2011-15 vs. 2016-20

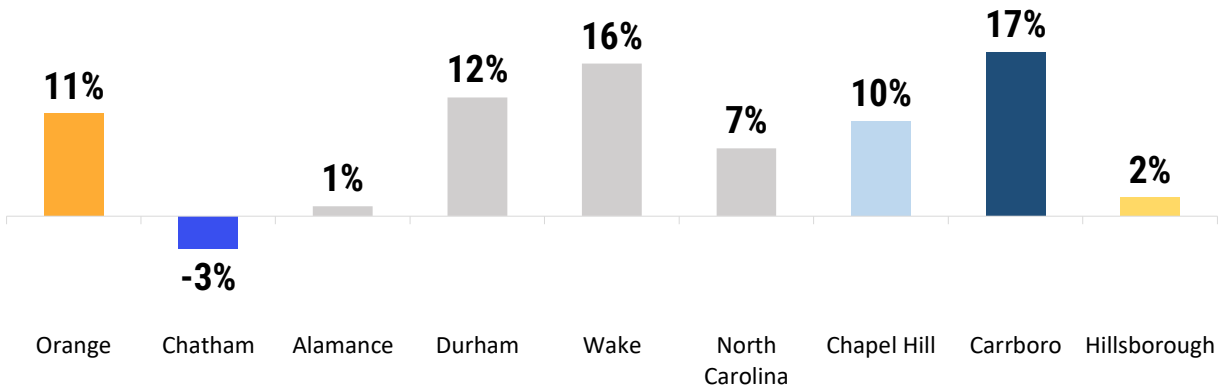


Source: American Community Survey 5-Year Estimates, 2011-15 & 2016-20

244

Growth in Median Rent, 2015 to 2020

Percent change in median rent (2011-2015) to (2016-2020)



Source: American Community Survey 5-Year Estimates, 2011-15 & 2016-20

245

2021 Local and State Fair Market Rent

Fair Market Rent (FMR): FMR is HUD's estimate of what a household seeking a modest rental home in a short amount of time can expect to pay for rent and utilities in the current market

	North Carolina	Durham-Chapel Hill HMFA (Orange, Durham, Chatham, & Person Counties)	Raleigh-Cary HMFA (Franklin, Johnston, and Wake Counties)	Alamance HMFA (Alamance County)
Zero Bedroom	\$817	\$1,024	\$1,038	\$619
One Bedroom	\$847	\$1,030	\$1,073	\$698
Two Bedroom	\$997	\$1,199	\$1,223	\$891
Three Bedroom	\$1,304	\$1,546	\$1,517	\$1,126
Four Bedroom	\$1,606	\$1,812	\$1,982	\$1,208



Source: National Low Income Housing Coalition, Out of Reach Report 2021

246

Orange County 2021 Housing Wage is \$19.81 (1-Bed Apt) Was \$18.73 in 2020 & \$17.35 in 2019

Housing wage: hourly wages needed to afford Fair Market Rent, 2021

	North Carolina	Durham-Chapel Hill HMFA (Orange, Durham, Chatham, & Person Counties)	Raleigh-Cary HMFA (Franklin, Johnston, and Wake Counties)	Alamance HMFA (Alamance County)
Zero Bedroom	\$15.72	\$18.69	\$19.96	\$11.90
One Bedroom	\$16.28	\$19.81	\$20.63	\$13.42
Two Bedroom	\$19.18	\$23.06	\$23.52	\$17.13
Three Bedroom	\$25.07	\$29.73	\$29.17	\$21.65
Four Bedroom	\$30.89	\$34.85	\$38.12	\$23.23



Source: National Low Income Housing Coalition, Out of Reach Report 2021

247

\$47,960/yr Needed to Afford 2-Bedroom Fair Market Rent Was \$45,360 in 2020 and \$42,200 in 2019

Annual salary needed to afford Fair Market Rent, 2021

	North Carolina	Durham-Chapel Hill HMFA (Orange, Durham, Chatham, & Person Counties)	Raleigh-Cary HMFA (Franklin, Johnston, and Wake Counties)	Alamance HMFA (Alamance County)
Zero Bedroom	\$32,689	\$40,960	\$41,520	\$24,760
One Bedroom	\$33,863	\$41,200	\$42,920	\$27,920
Two Bedroom	\$39,897	\$47,960	\$48,920	\$35,640
Three Bedroom	\$52,148	\$61,840	\$60,680	\$45,040
Four Bedroom	\$64,252	\$72,480	\$79,280	\$48,320



Source: National Low Income Housing Coalition, Out of Reach Report 2021

248

109 Hours a Week of Work Needed for Minimum Wage Worker to Afford Local 1-Bedroom. Was 103hrs in 2020 and 96hrs in 2019

Weekly hours of minimum wage work needed to afford Fair Market Rent, 2021

	North Carolina	Durham-Chapel Hill HMFA (Orange, Durham, Chatham, & Person Counties)	Raleigh-Cary HMFA (Franklin, Johnston, and Wake Counties)	Alamance HMFA (Alamance County)
Zero Bedroom	87	109	110	66
One Bedroom	90	109	114	74
Two Bedroom	106	127	130	95
Three Bedroom	138	164	161	119
Four Bedroom	170	192	210	128



Source: National Low Income Housing Coalition, Out of Reach Report 2021

249

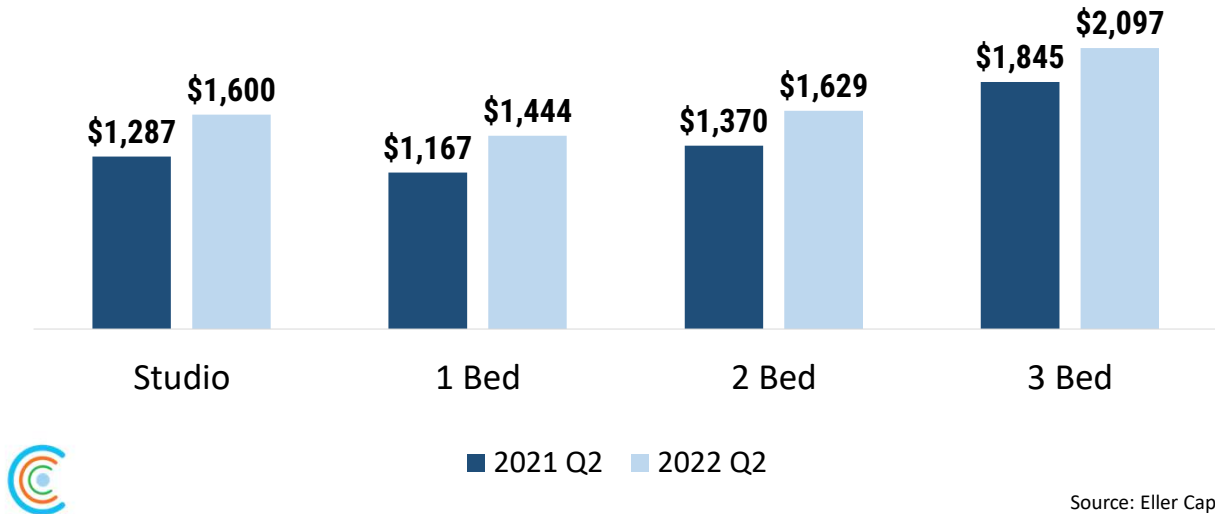
Current Multifamily Rental Rates (through June 2022)



250

Average 2-Bedroom Rent Up \$259 a Month 1-Bedroom Rent Up 24% Since June 2021

Chapel Hill-Carrboro multifamily average asking rent Q2 2021 compared to Q2 2022



251

Chapel Hill and Carrboro's 11,728 Multifamily Units by Star Rating, Units, Vacancy, and Rent

	Units	Vacancy Rate	Asking Rent
4 & 5 Star	4,164	11.80%	\$1,971
3 Star	6,151	7.10%	\$1,423
1 & 2 Star	1,413	3.70%	\$1,312
Total	11,728	8.30%	\$1,609

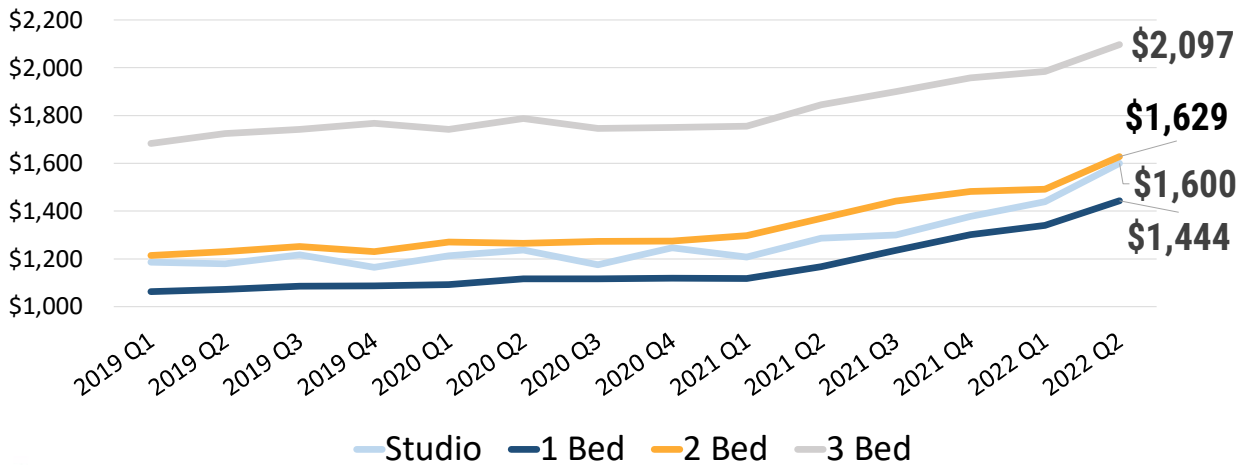


Source: Eller Capital

252

Local Average Rent up 25.6% in 15 Months

Chapel Hill and Carrboro multifamily average asking rent by unit size from Q1 2019 to Q2 2022

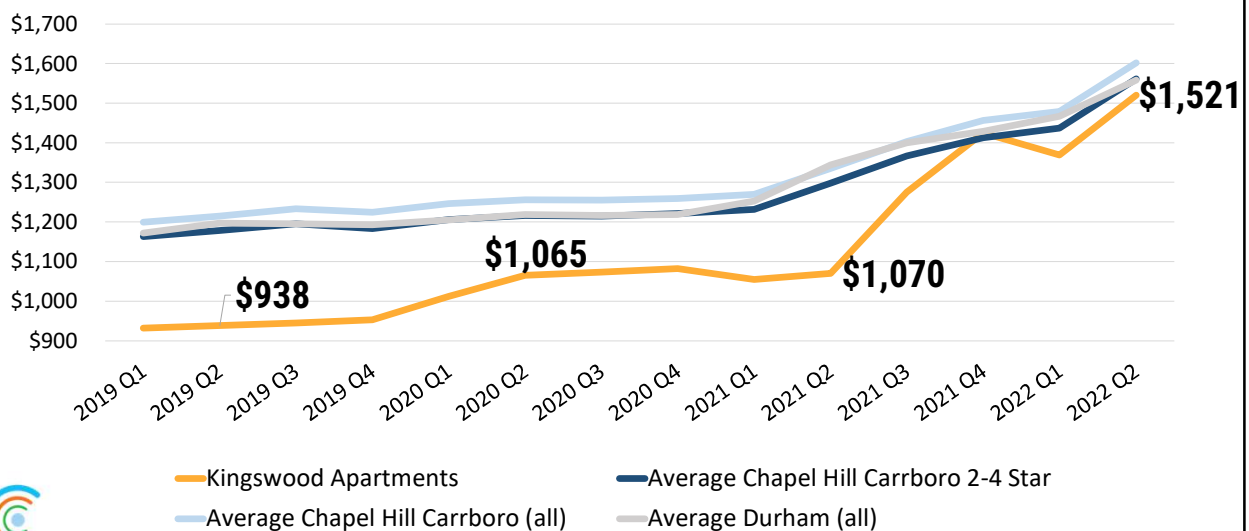


Source: Eller Capital

253

Local Rental Community Example 1: Kingswood Apartments

Kingswood Apartments' quarterly rent compared to Chapel Hill-Carrboro peer properties, all Chapel Hill-Carrboro properties, and all Durham Properties (Q1 2019 through Q2 2022)

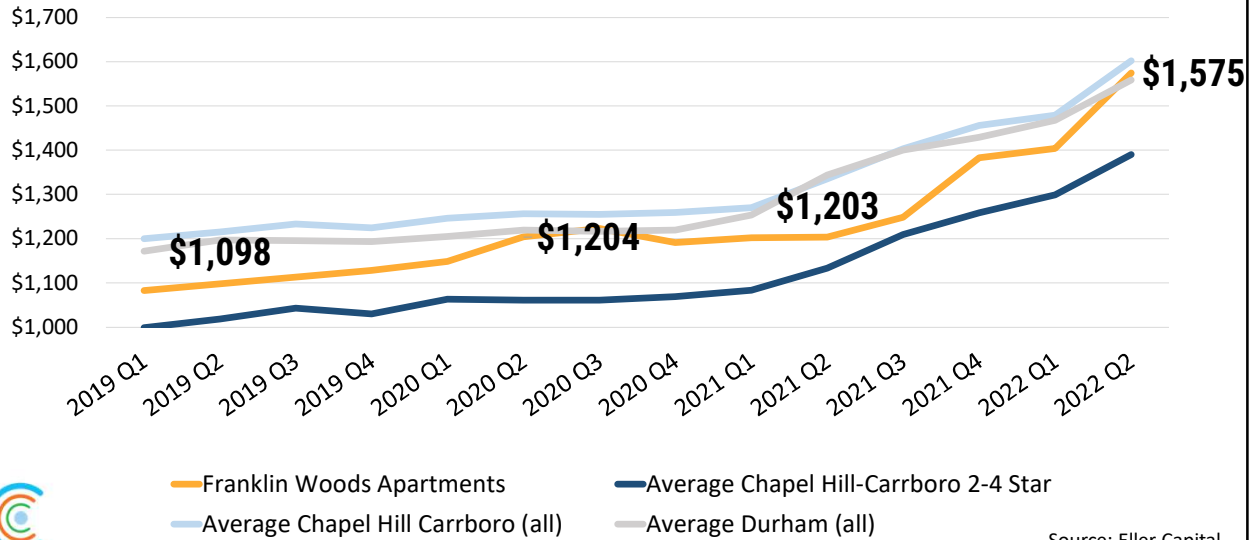


Source: Eller Capital

254

Local Rental Community Example 2: Franklin Woods Apts

Franklin Woods Apartments' quarterly asking compared to Chapel Hill-Carrboro peer properties, all Chapel Hill-Carrboro properties, and all Durham Properties (Q1 2019 - Q2 2022)



255

Rental Price Per Square Foot Jumps to \$1.75

Chapel Hill-Carrboro multifamily apartments daily asking rent per square foot



256

Health Indicators



257

Orange Ranks First in Clinical Care & Social/Economic Factors

County rank, out of the 100 counties in North Carolina

	Orange	Chatham	Durham	Who is #1
Length of Life	2	14	7	Wake
Quality of Life	3	9	8	Wake
Health Behaviors	2	3	9	Wake
Clinical Care	1	9	6	Orange
Social & Economic Factors	1	11	21	Orange
Physical Environment	8	31	41	Onslow

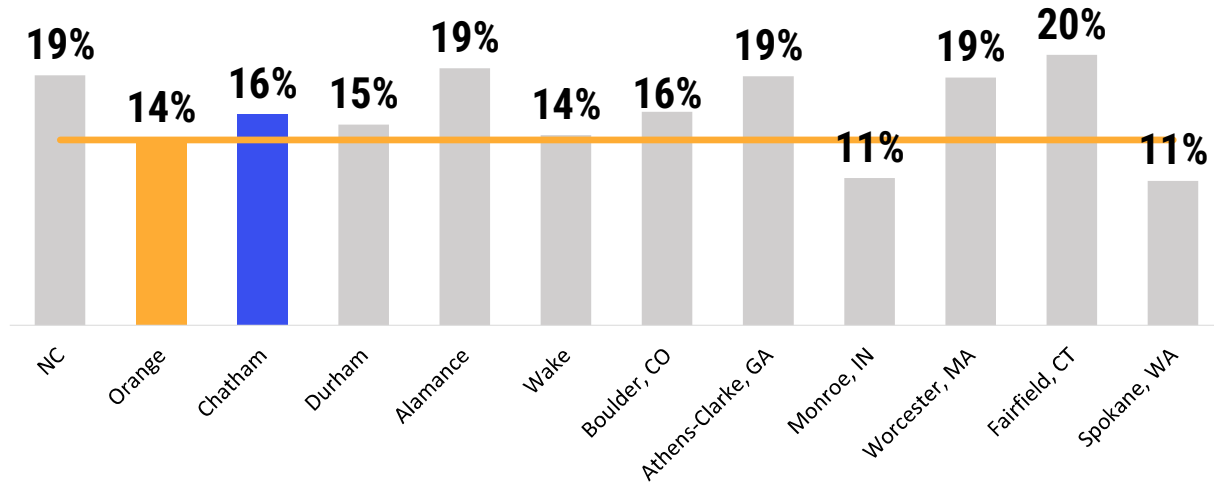


Source: 2022 Robert Wood Johnson Foundation Health Rankings

258

Adult Smoking

RWJF: Percentage of adults who are current smokers



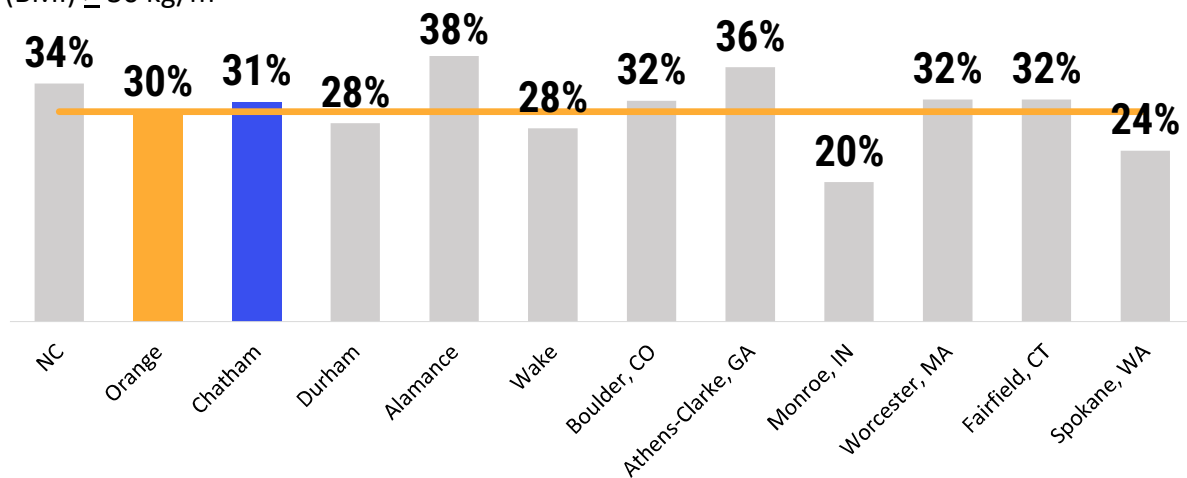
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2019 source data)

259

Adults with Obesity

2022 RWJF: Percentage of the adult population (age 20+) that reports a body mass index (BMI) ≥ 30 kg/m²



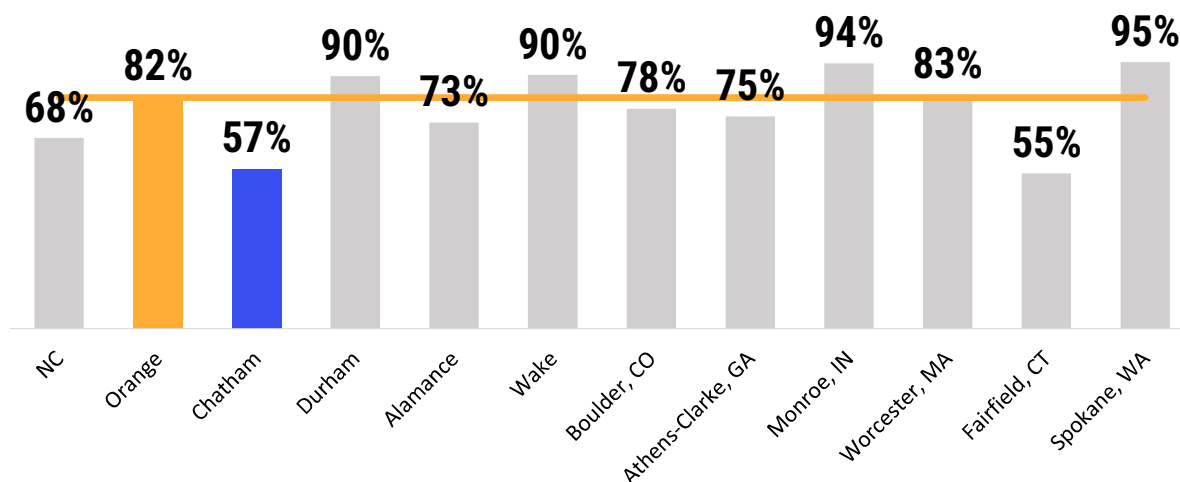
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2019 source data)

260

Access to Exercise Opportunities

2022 RWJF: Percentage of population with adequate access to locations for physical activity



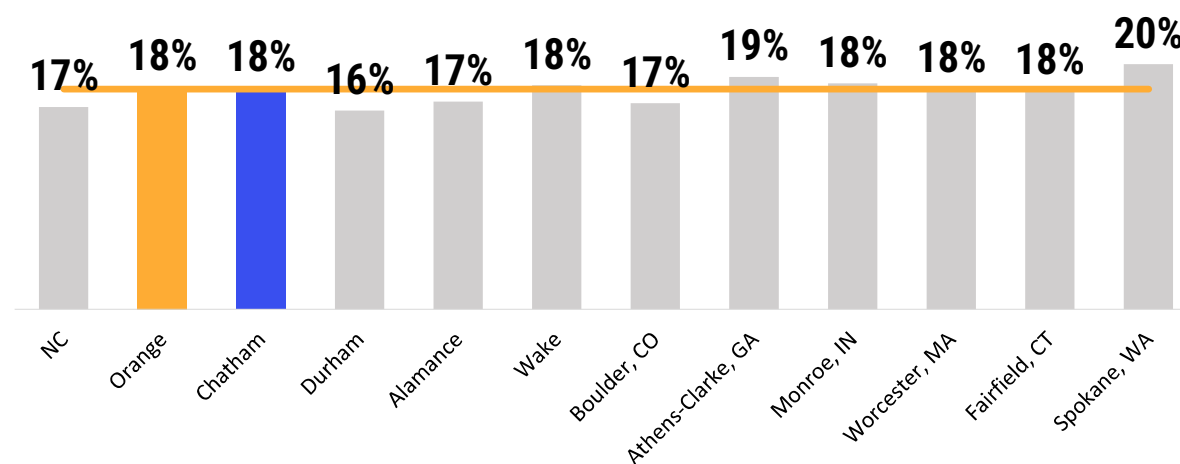
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2021 source data)

261

Excessive Drinking

2022 RWJF: Percentage of adults who report binge or heavy drinking



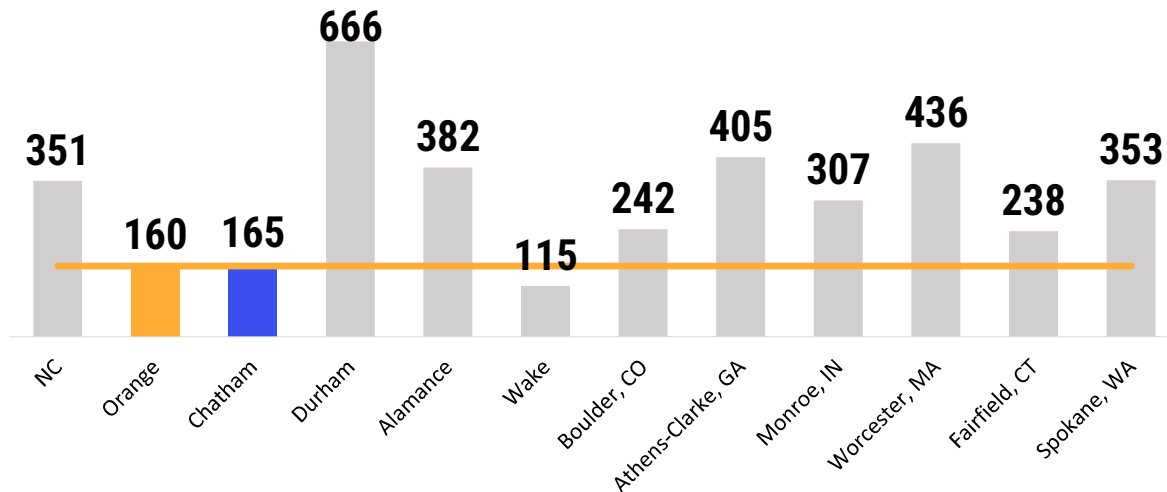
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2019 source data)

262

Violent Crime per 100,000 Residents

2022 RWJF: Number of violent crime offenses per 100,000 population



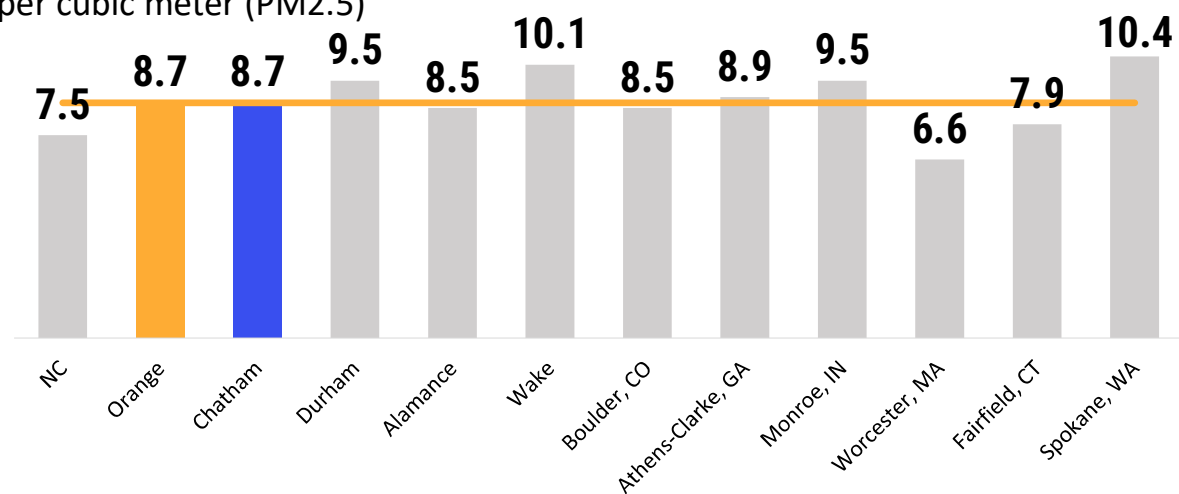
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2014 and 2016 source data)

263

Air Pollution – Particulate Matter

2022 RWJF: Average daily density of fine particulate matter in micrograms per cubic meter (PM2.5)



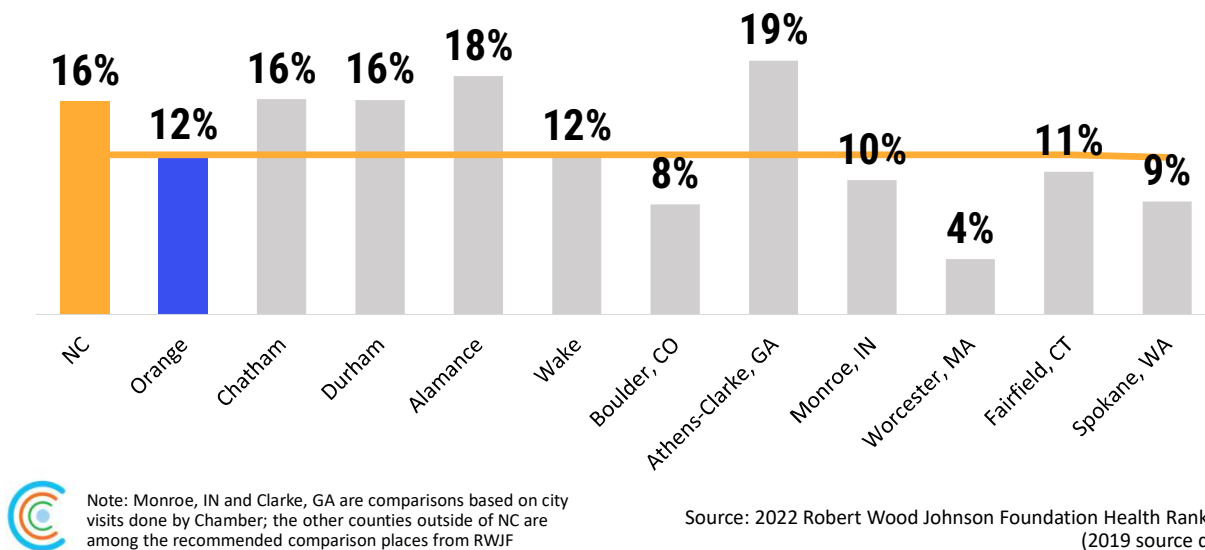
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2018 source data)

264

Uninsured Adults

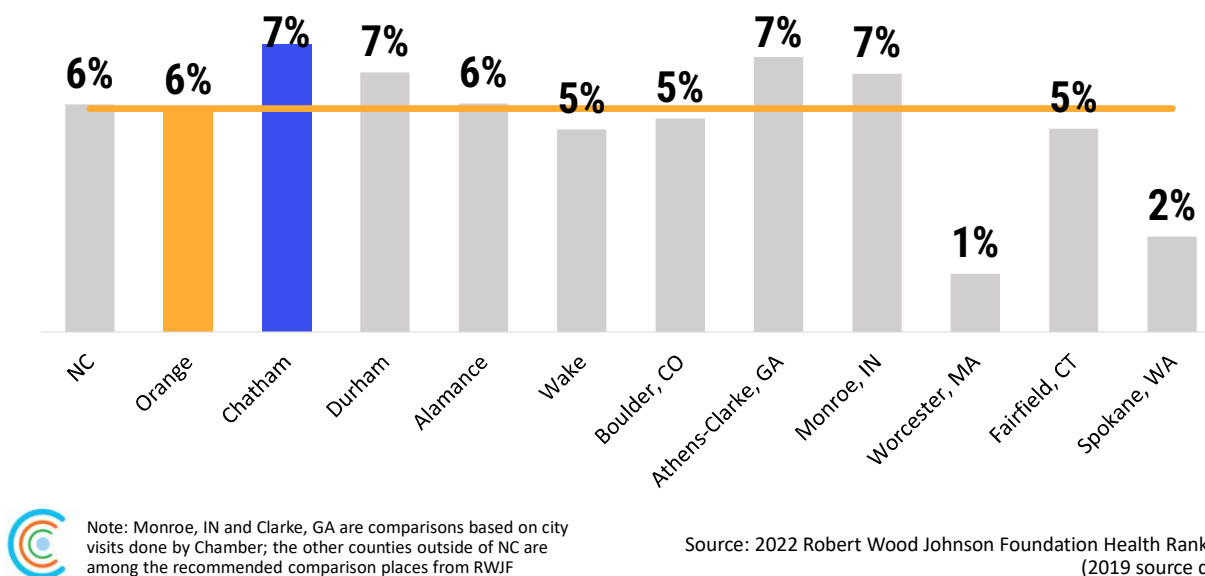
2022 RWJF: Percentage of adults under age 65 without health insurance



265

Uninsured Children

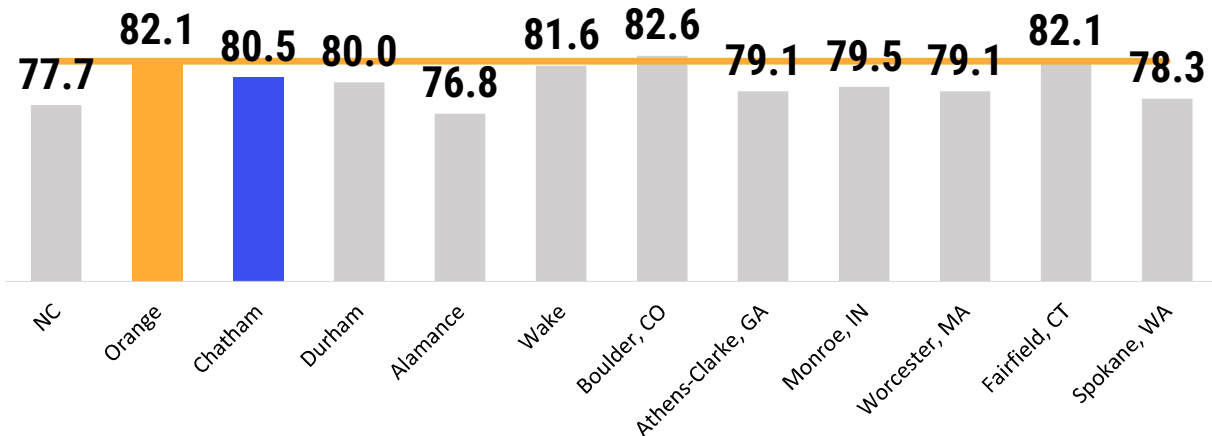
2022 RWJF: Percentage of children under age 19 without health insurance



266

Life Expectancy

2022 RWJF: Average number of years a person can expect to live



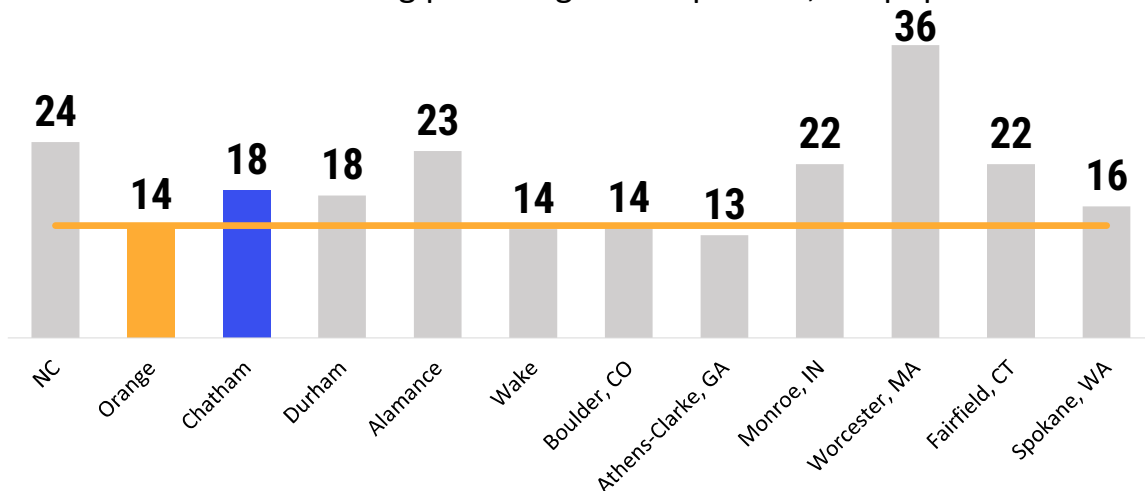
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2018-2020 source data)

267

Drug Overdose Deaths

2022 RWJF: Number of drug poisoning deaths per 100,000 population



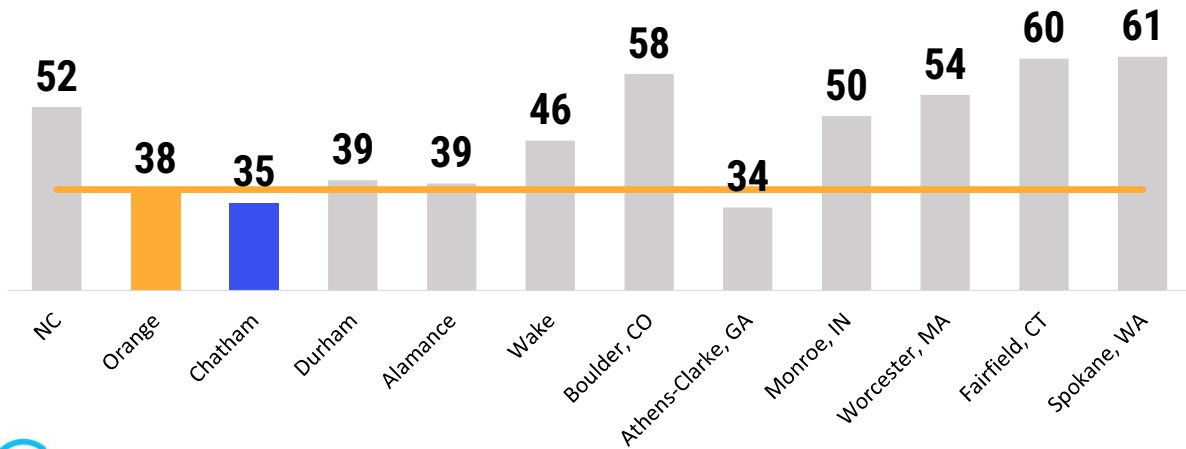
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2018-2020 source data)

268

Black/White Residential Segregation

2022 RWJF: Index of dissimilarity where higher values indicate greater residential segregation between Black and White county residents.



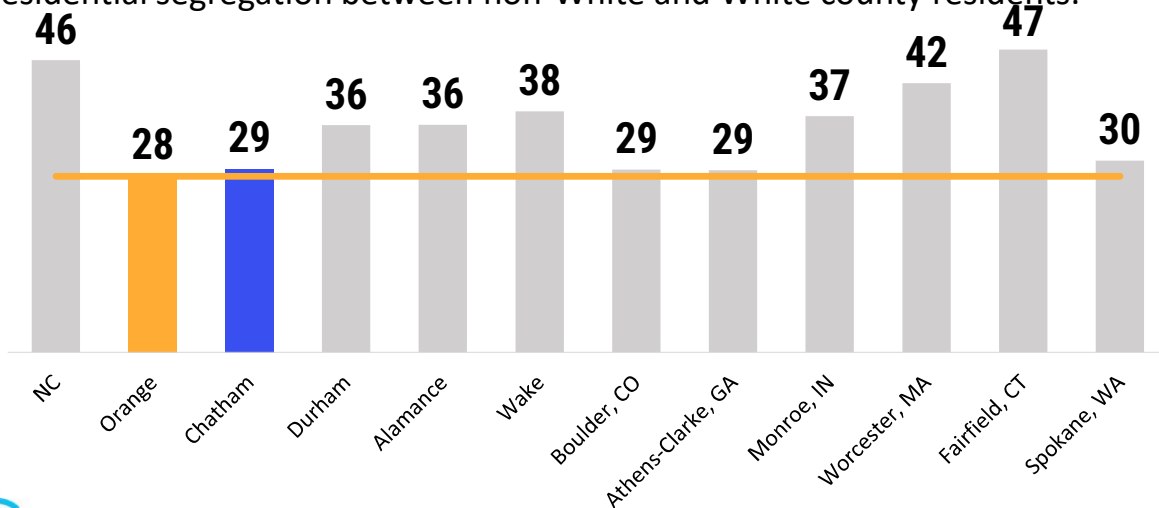
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2016-2020 source data)

269

Non-White/White Residential Segregation

2022 RWJF: Index of dissimilarity where higher values indicate greater residential segregation between non-White and White county residents.



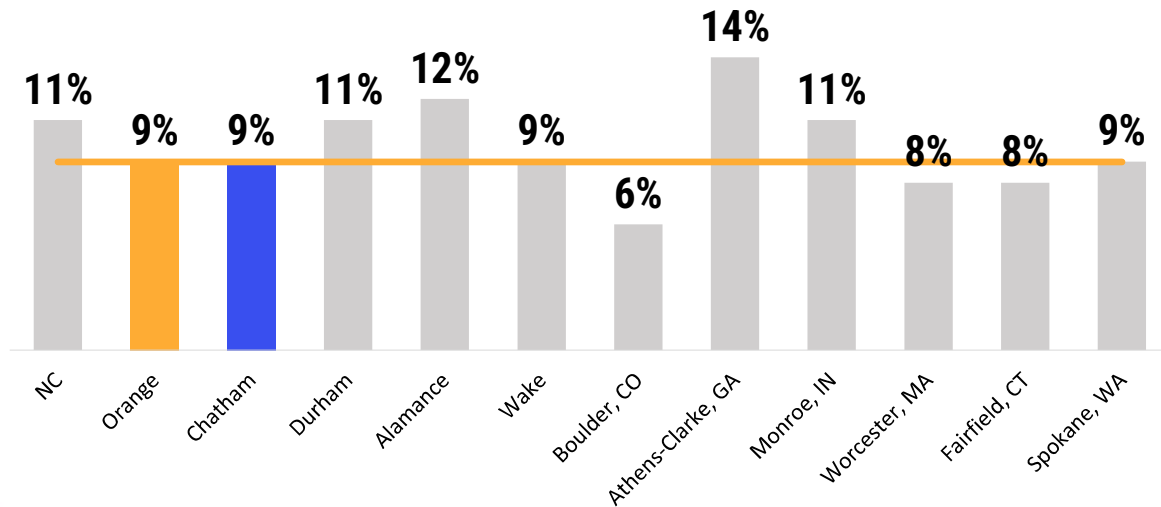
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2016-2020 source data)

270

Diabetes Prevalence

2022 RWJF: Percentage of adults (20+) with diagnosed diabetes



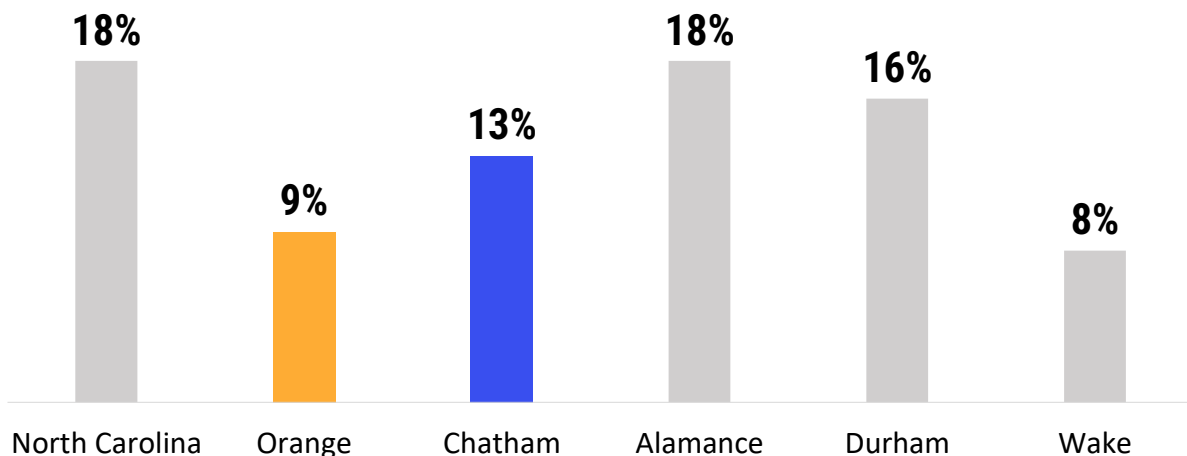
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2019 source data)

271

9% of Orange County Children Live in Poverty

2022 RWJF: Percent of people under the age of 18 living in poverty

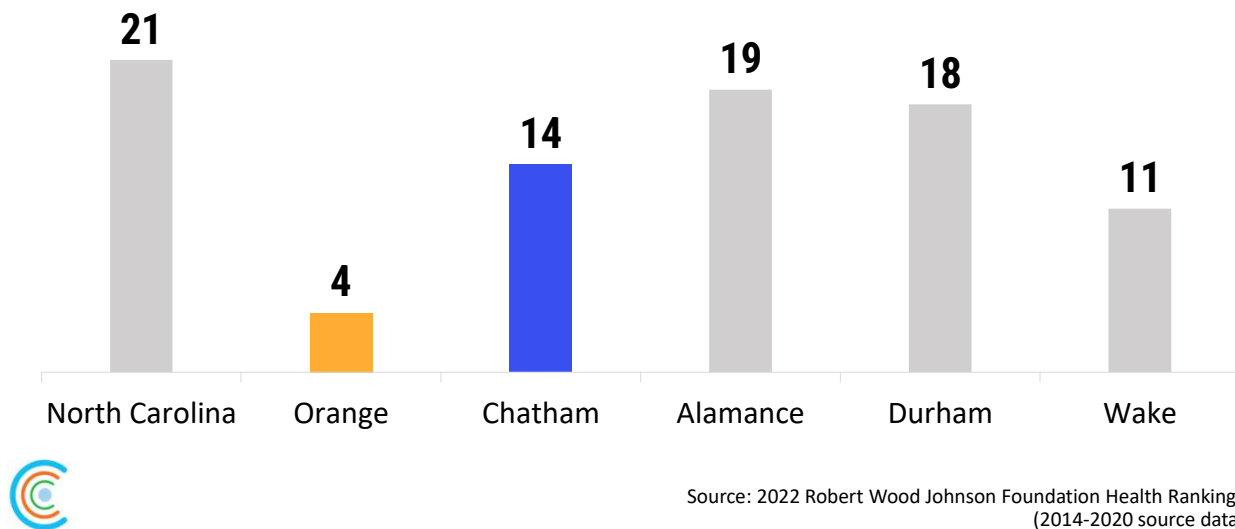


Source: 2022 Robert Wood Johnson Foundation Health Rankings (2020 source data)

272

Teenage Birth Rate: Orange County Lowest, One Fifth of NC

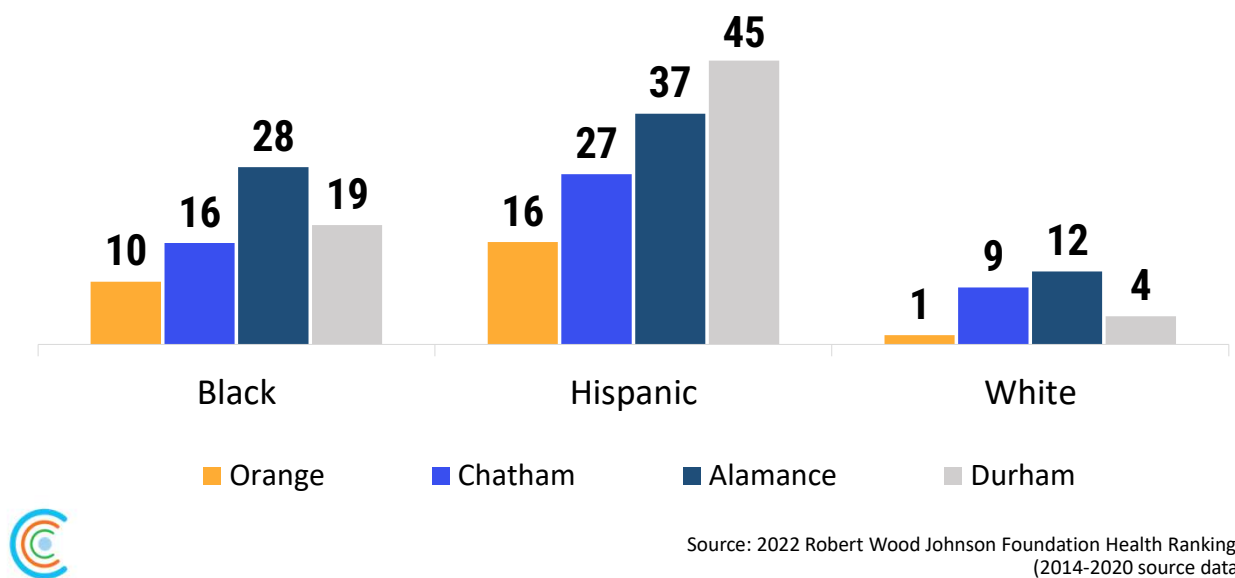
2022 RWJF: Number of births per 1,000 females ages 15-19



273

Teenage Birth Rate Highest Among Hispanic Females

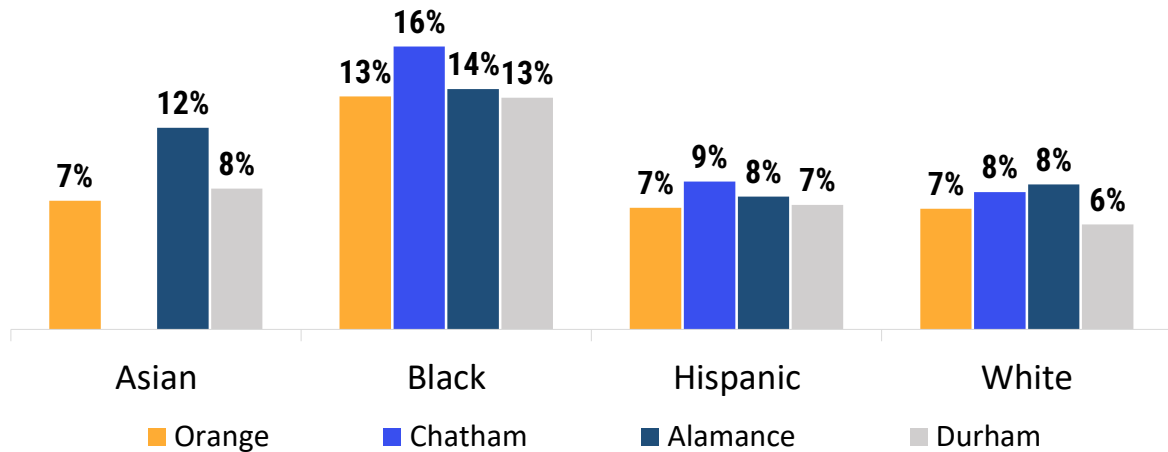
2022 RWJF: Births per 1,000 females ages 15-19 by race/ethnicity



274

Percent of Births with Low Birthweight by Race/Ethnicity

2022 RWJF: Low birthweight <2500g (<5.5lbs)

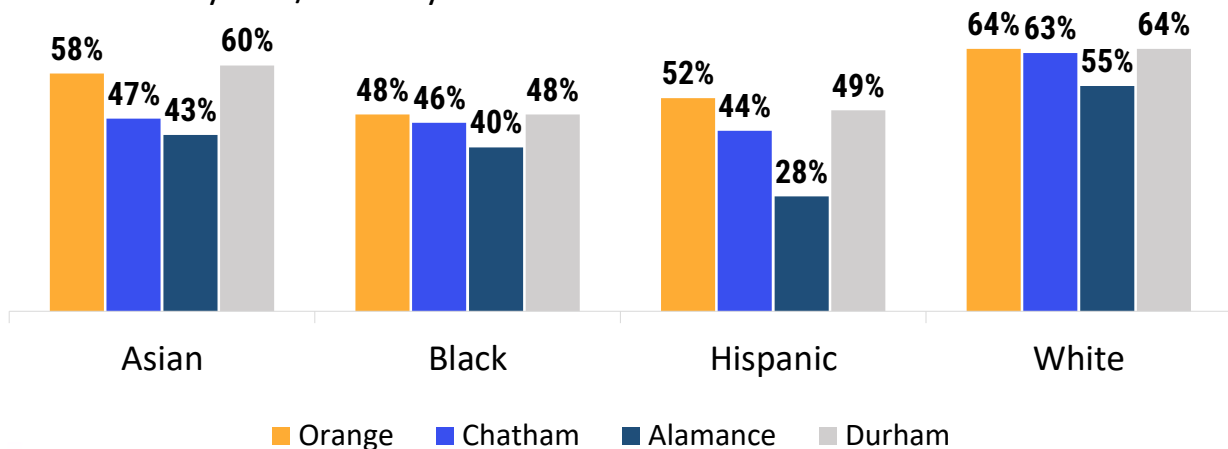


Source: 2022 Robert Wood Johnson Foundation Health Rankings
(2014-2020 source data)

275

Percentage of Medicare Enrollees Who Received an Annual Flu Vaccination by Race/Ethnicity

2022 RWJF: Percentage of Medicare enrollees who received an annual flu vaccination by race/ethnicity

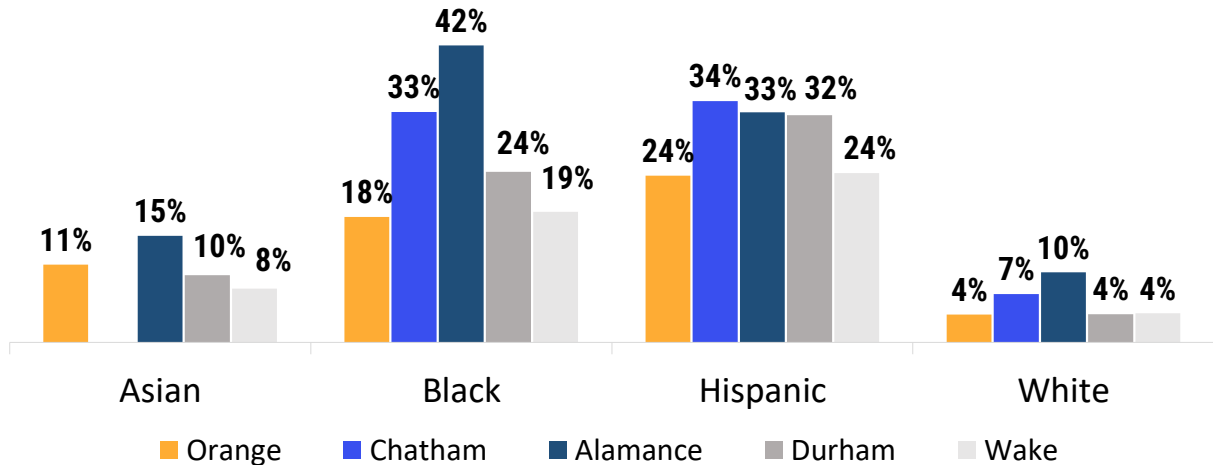


Source: 2022 Robert Wood Johnson Foundation Health Rankings
(2019 source data)

276

Hispanic and Black Children More Likely to be Living in Poverty

2022 RWJF: Percentage of children (under 18) living in poverty by race/ethnicity



Source: 2022 Robert Wood Johnson Foundation Health Rankings
(2020 source data)

277

Causes of Death Led by Cancer and Heart Disease

Orange County (2016-2020)

1. Cancer - All Sites (23.3%)
2. Diseases of the heart (18.3%)
3. Other Unintentional injuries (4.8%)
4. Cerebrovascular disease (4.6%)
5. Chronic lower respiratory diseases (4.3%)
6. Alzheimer's disease (3.5%)
7. Diabetes mellitus (2.6%)
8. Suicide (1.8%)
9. Nephritis, nephrotic syndrome, & nephrosis (1.8%)
10. Septicemia (1.6%)

Chatham County (2016-2020)

1. Cancer - All Sites (22.7%)
2. Diseases of the heart (18.8%)
3. Cerebrovascular disease (6.2%)
4. Alzheimer's disease (4.5%)
5. Other Unintentional injuries (4.3%)
6. Chronic lower respiratory diseases (3.9%)
7. Diabetes mellitus (3.3%)
8. Parkinson's disease (1.9%)
8. Motor vehicle injuries (1.9%)
10. Pneumonia & influenza (1.6%)

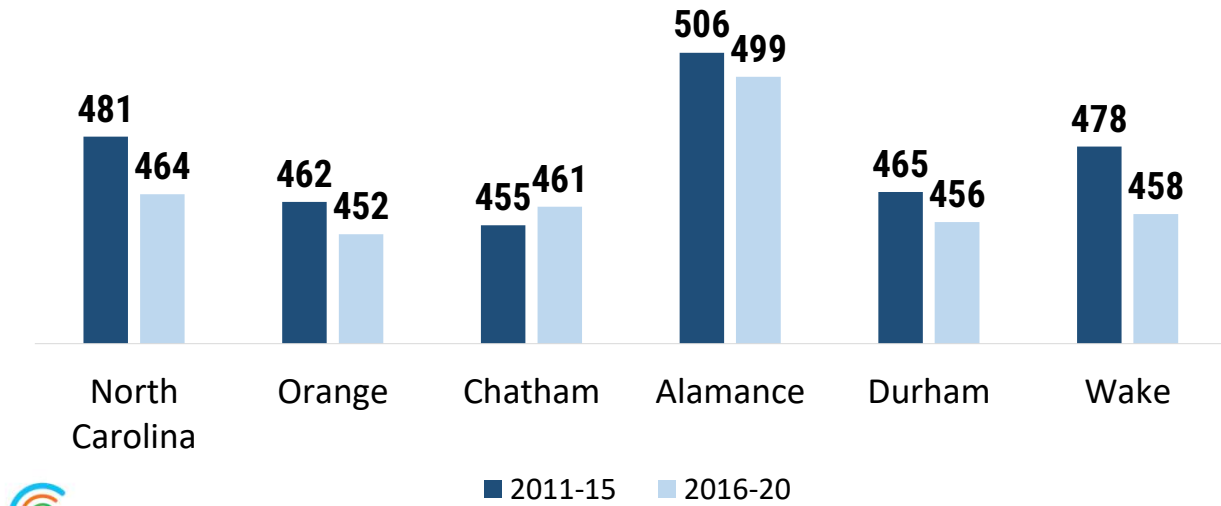


Source: NC State Center for Health Statistics

278

'All Cancer' Rate Down in the Region, Up in Chatham

All cancer rate per 100,000 (2011-2015 vs. 2016-2020)

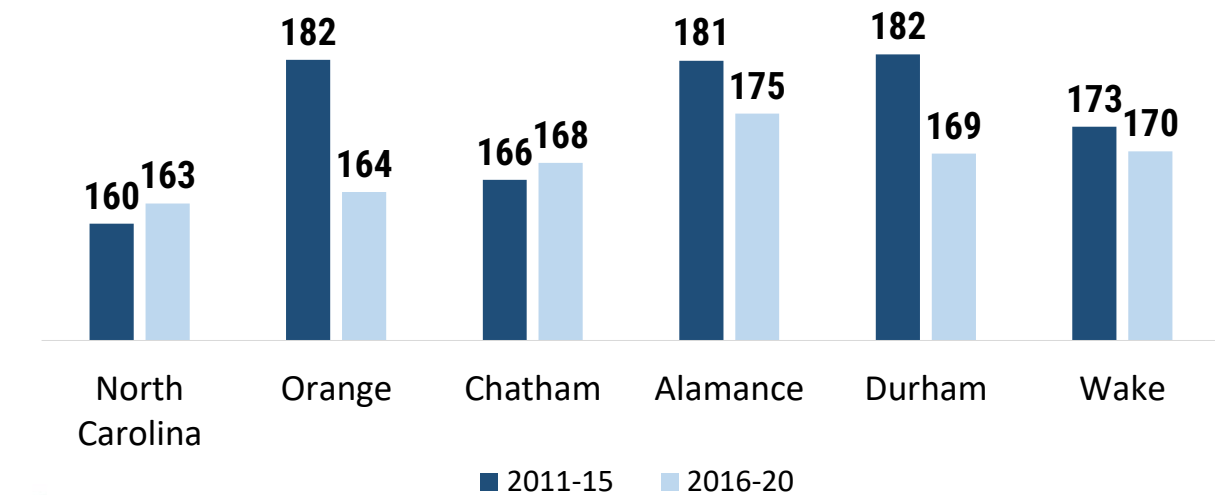


Source: NC State Center for Health Statistics

279

Breast Cancer Rates Decline in Orange Significantly

Female breast cancer rates per 100,000 (2011-2015 vs. 2016-2020)

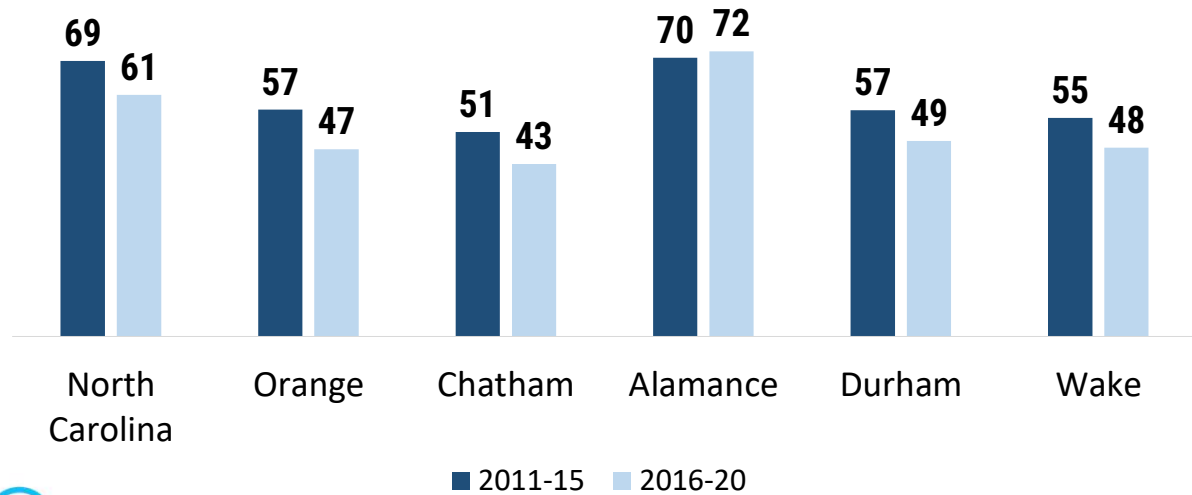


Source: NC State Center for Health Statistics

280

All Counties See Decreases in Lung/Bronchus Cancer Rate Except Alamance

Lung/Bronchus cancer rate per 100,000 (2011-2015 vs. 2016-2020)

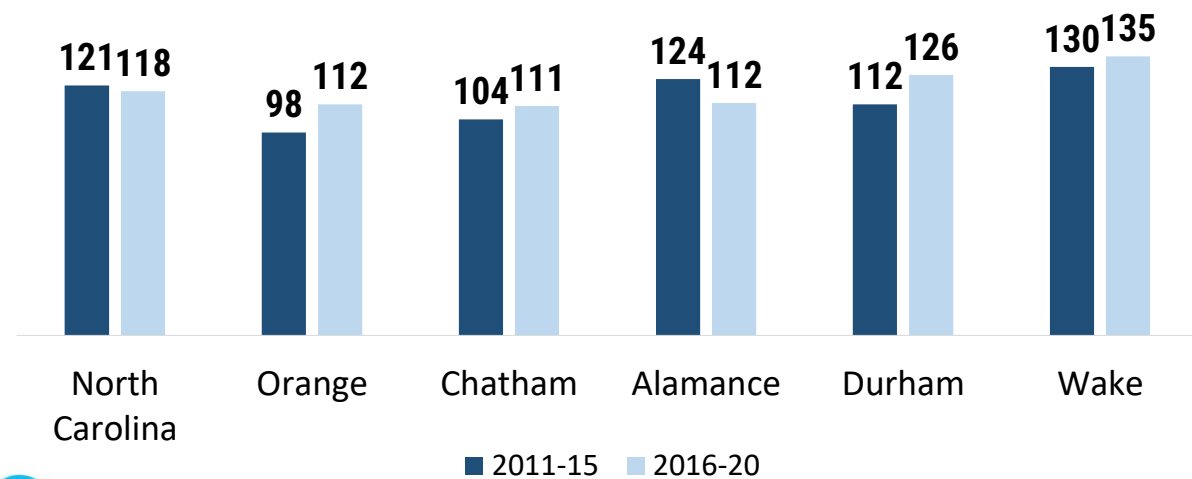


Source: NC State Center for Health Statistics

281

Prostate Cancer Rates Rise Across the Region, Declines in Alamance and NC

Prostate Cancer rate per 100,000 (2011-2015 vs. 2016-2020)

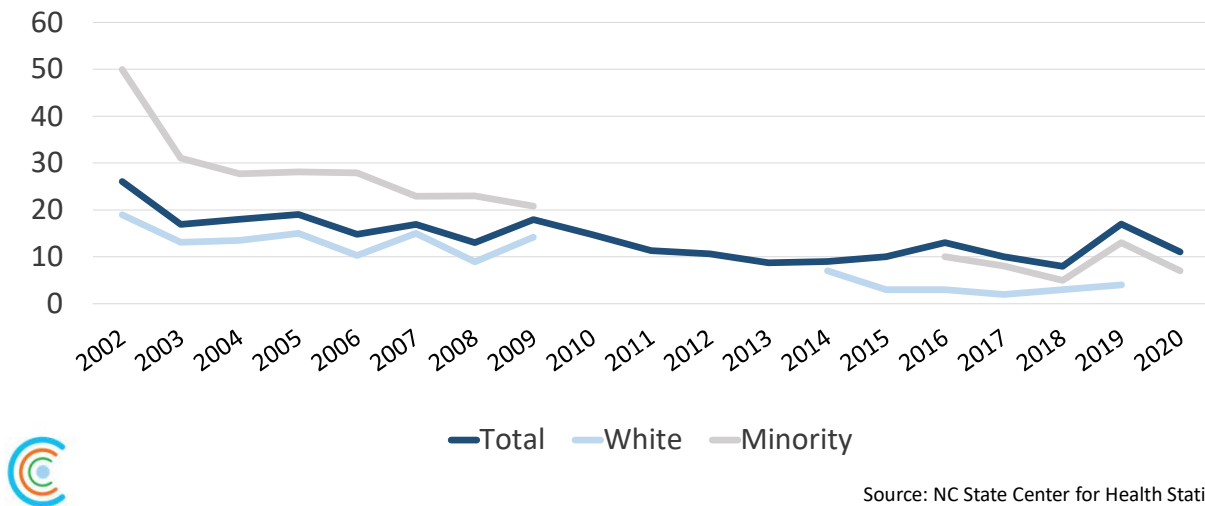


Source: NC State Center for Health Statistics

282

Steady Decline in Teenage Pregnancies in Orange County Across All Races

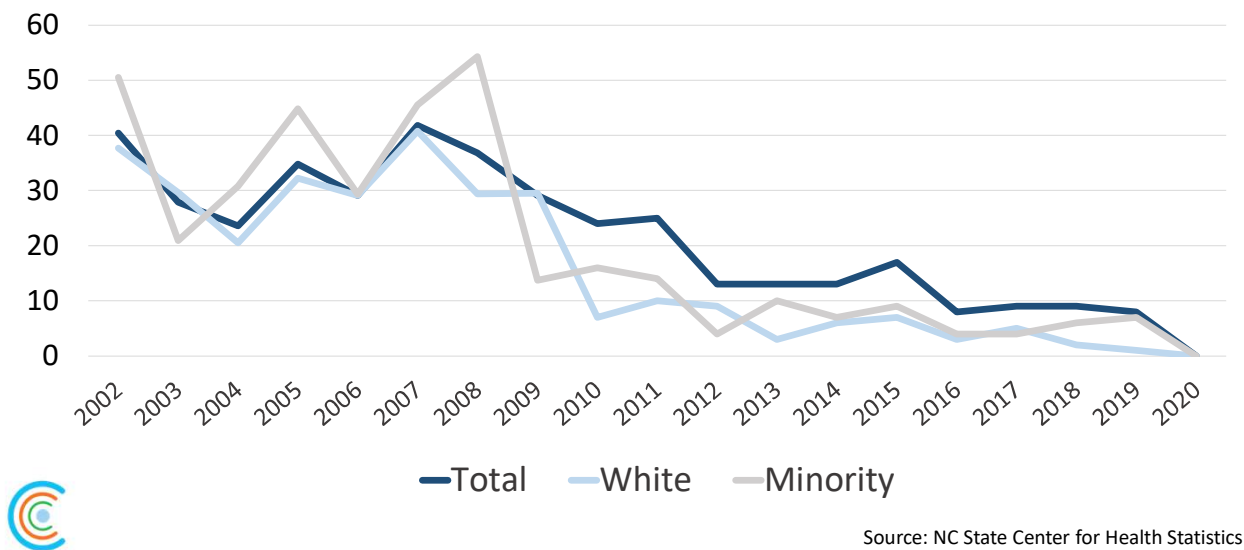
Number of pregnancies per 1,000, ages 15-17, 2002 to 2020



283

No Teen Pregnancies Reported Among 15-17 Year-Olds In Chatham in 2020

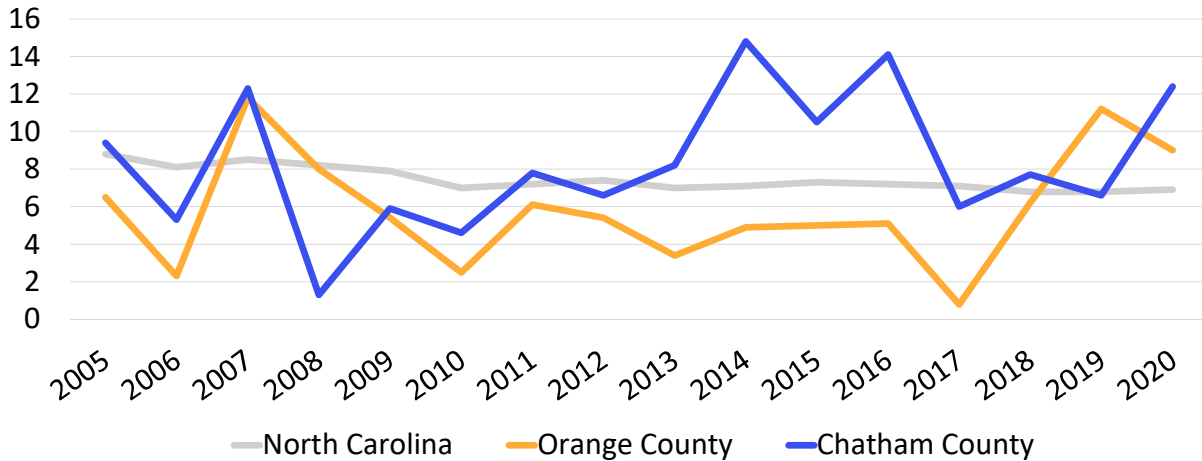
Number of pregnancies per 1,000, ages 15-17, 2002-2020



284

Infant Mortality in Orange and Chatham Above State Average

Number of infant deaths (under 1 year of age) per 1,000 live births, 2005-2020



Note: Rates based on small numbers (fewer than 10 deaths) are unstable & should be interpreted with caution

Source: NC State Center for Health Statistics

285

Poverty and Food Insecurity



286

Percent of People in Poverty Declines Across Region

	2010	2015	2020
Orange County	17%	14%	10%
Chatham County	14%	12%	9%
Durham County	18%	17%	11%
Alamance County	18%	19%	15%
Wake County	12%	11%	7%
North Carolina	17%	16%	12%
United States	15%	15%	11%

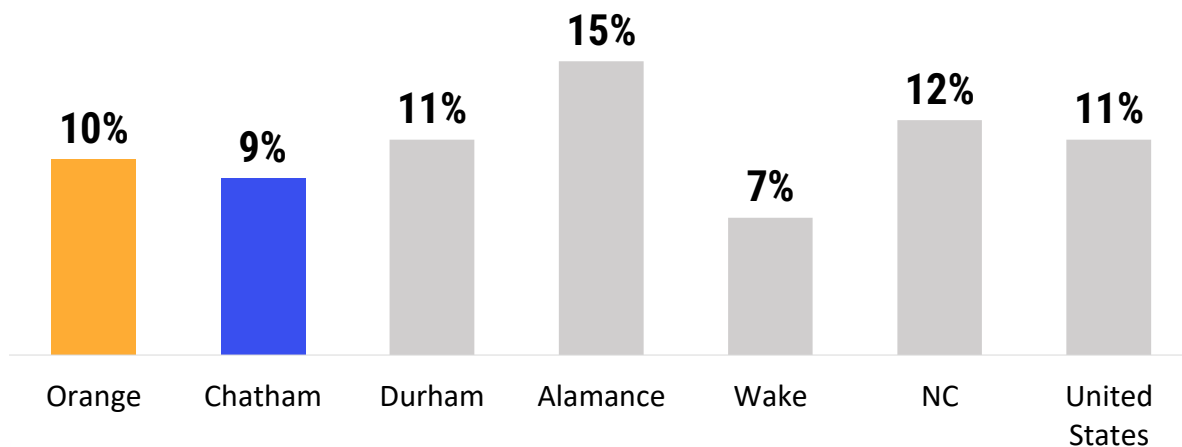


Source: U.S. Census Bureau Small Area Income and Poverty Estimates (SAIPE)

287

Chatham and Wake Have Lowest Local Poverty Rate

Percent of people (all ages) in poverty, 2020

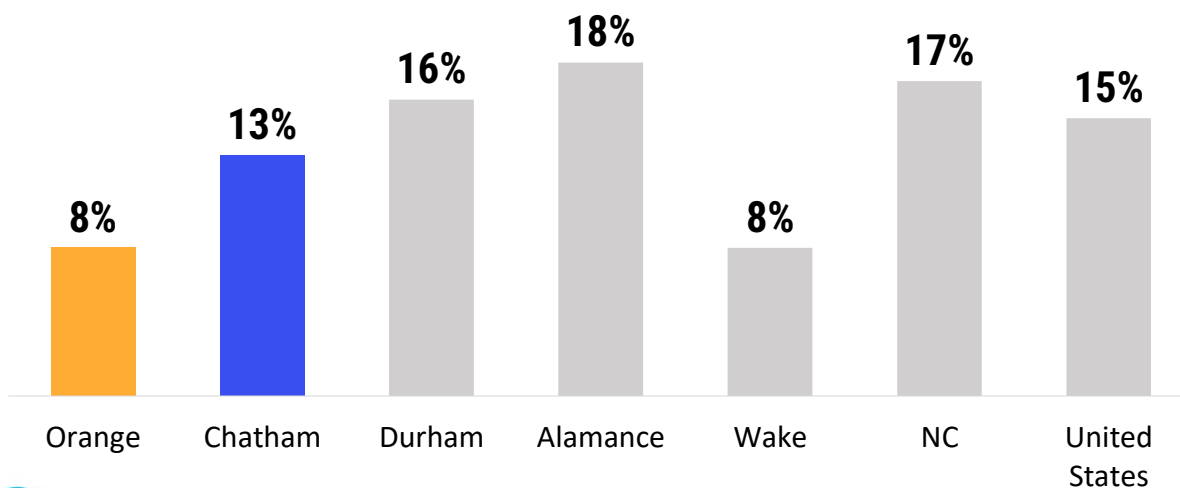


Source: U.S. Census Bureau Small Area Income and Poverty Estimates (SAIPE)

288

Orange & Wake Have Lowest Local Child Poverty Rate

Percent of children (under 18) in poverty, 2020

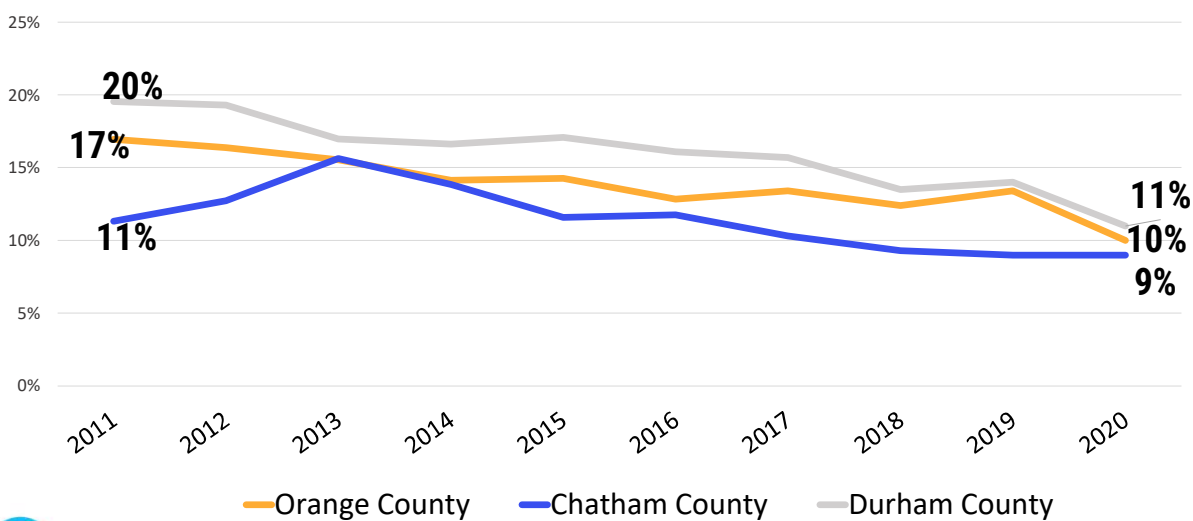


Source: U.S. Census Bureau Small Area Income and Poverty Estimates (SAIPE)

289

Poverty Rates Decline 7 Points from Peak in Early 2010s

Percent of people (all ages) in poverty, 2011-2020



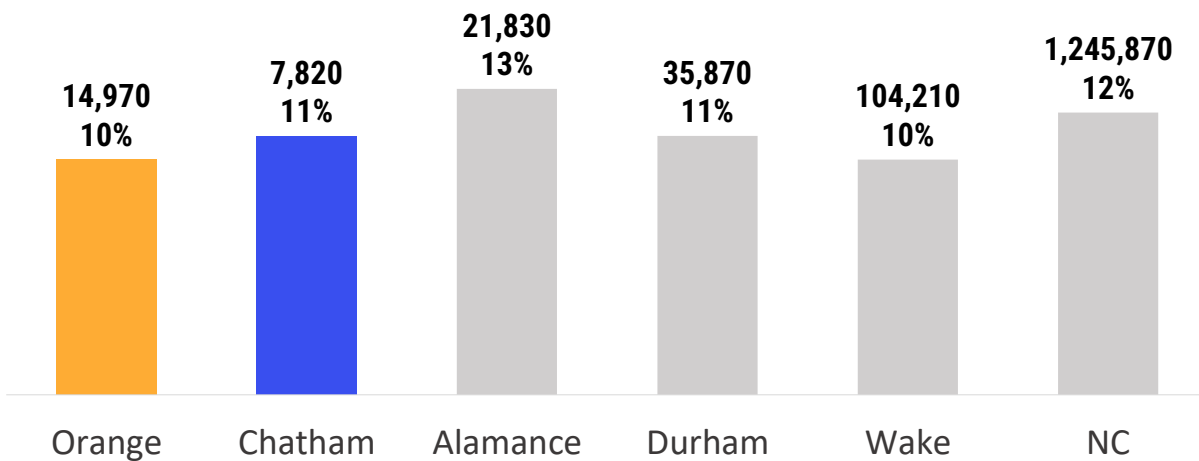
Source: U.S. Census Bureau Small Area Income and Poverty Estimates (SAIPE)

290

Food Insecurity Rate, 2020

Number and percent of population experiencing Food Insecurity

USDA: Food Insecurity is a lack of consistent access to enough food for an active, healthy life



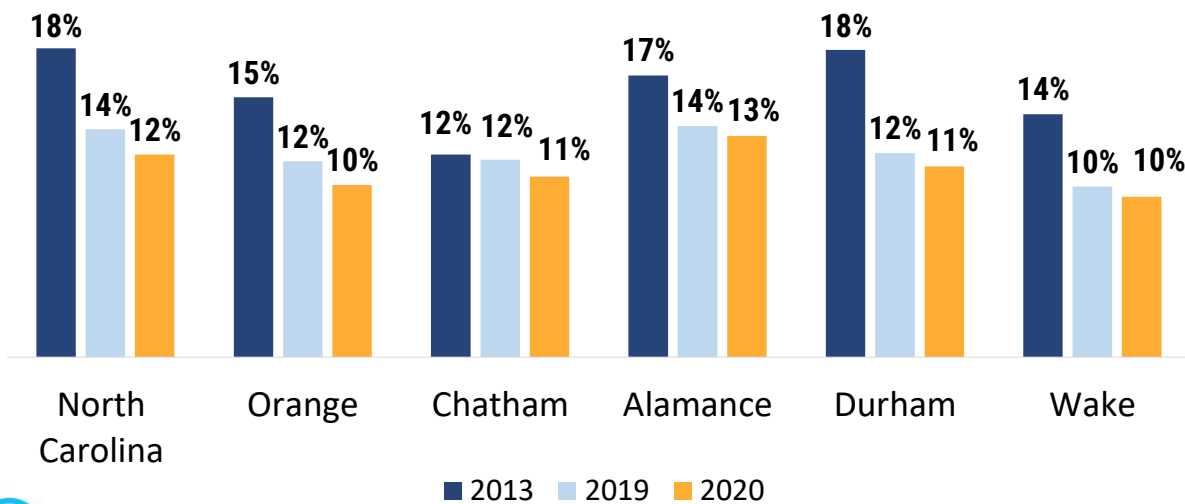
Source: Feeding America

291

Food Insecurity Rate Declining Across Region

Percentage of population experiencing Food Insecurity

USDA: Food Insecurity is a lack of consistent access to enough food for an active, healthy life

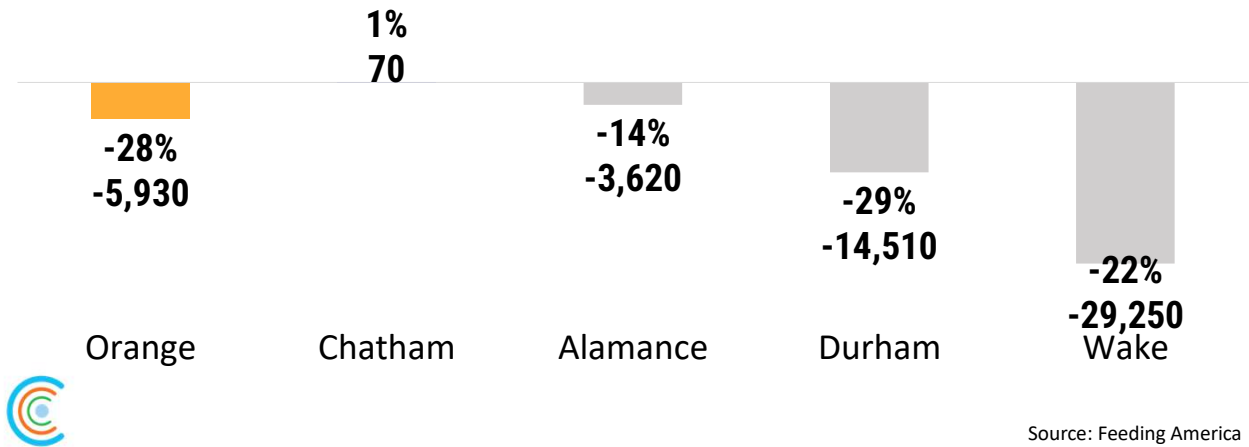


Source: Feeding America

292

Change in Number and Percent of Food Insecure Individuals 2013-2020

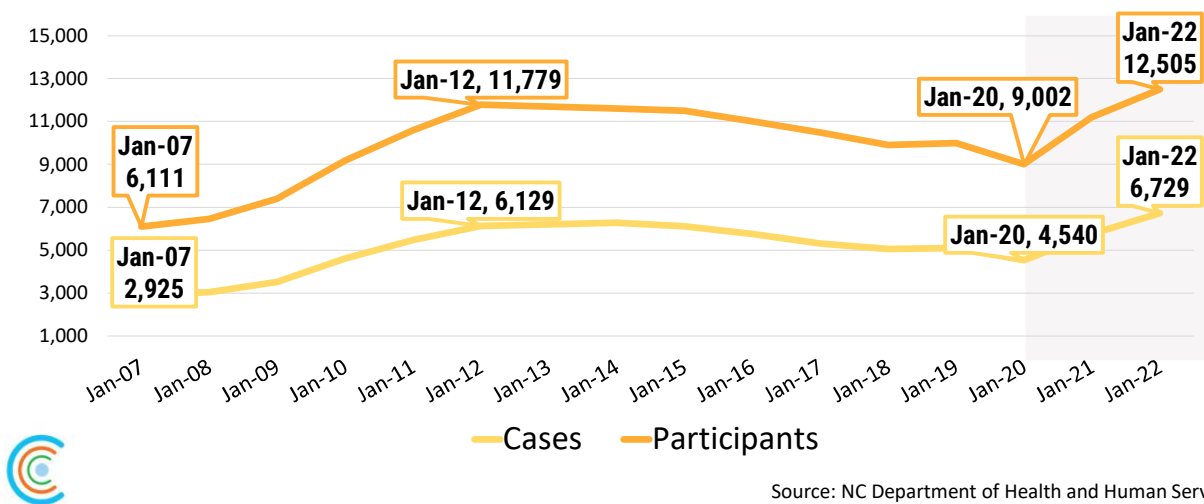
Change in the percent and number of food insecure individuals from 2013 to 2020 (USDA: Food Insecurity is a lack of consistent access to enough food for an active, healthy life) NC has 556,070 fewer food insecure individuals (-31%)



293

Orange County FNS Cases & Participants 2007-2022

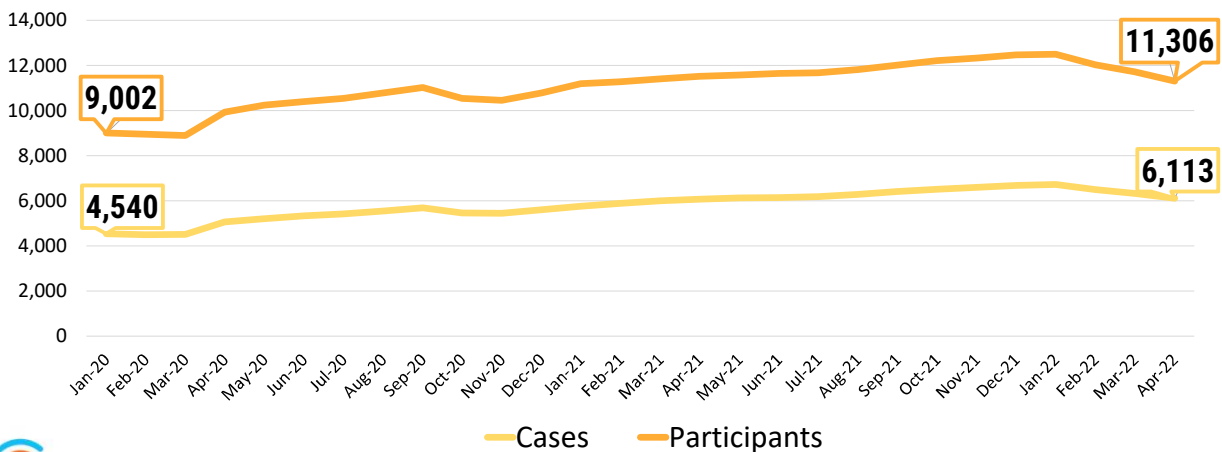
Number of cases (families) and participants (individuals) receiving Orange County Food and Nutrition Services (FNS, formerly Food Stamps) in January each year 2007 through 2022



294

Orange County FNS Cases & Participants Up Since Onset of Covid-19

Number of cases (families) and participants (individuals) receiving Orange County Food and Nutrition Services (FNS, formerly Food Stamps) Jan 2020 – April 2022

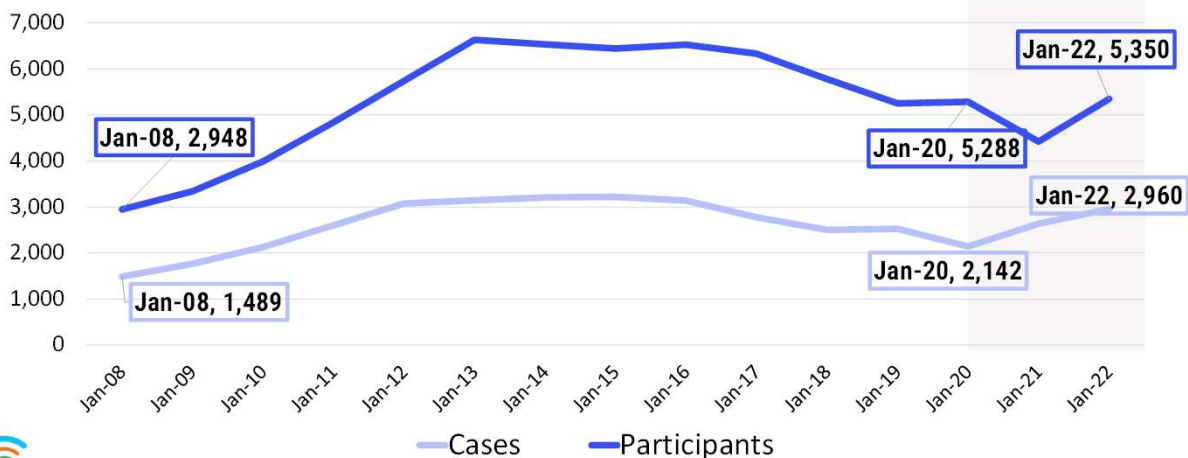


Source: NC Department of Health and Human Services

295

Chatham County FNS Cases & Participants Increase After Start of COVID-19

Number of cases (families) and participants (individuals) receiving Chatham County Food and Nutrition Services (FNS, formerly Food Stamps) in January each year 2008 through 2022



Source: NC Department of Health and Human Services

296

Federal Income Eligibility Guidelines for Free and Reduced-Price School Meals (Annualized)

'Free' meals are available for families earning less than 130% of the federal poverty line and 'reduced' for families 130-185% of poverty. These rates are for July 1, 2022 to June 30, 2023

Household Size	Free	Reduced Price
Household of 1	\$17,667	\$25,142
Household of 2	\$23,803	\$33,874
Household of 3	\$29,939	\$42,606
Household of 4	\$36,075	\$51,338
Household of 5	\$42,211	\$60,070
Household of 6	\$48,347	\$68,802
Household of 7	\$54,483	\$77,534

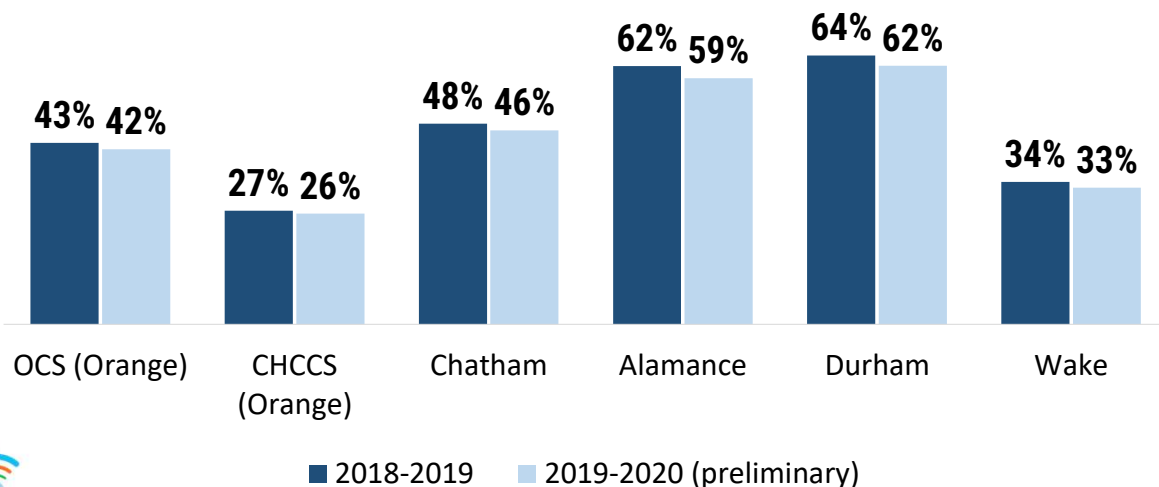


Source: US Department of Agriculture

297

Percent of Students Enrolled in Free & Reduced Meals Declines Slightly in Local & Neighboring Districts

Percent of local students qualifying for free or reduce price meals ('Free' meals are available for families earning less than 130% of the federal poverty line and 'Reduced' for families earning 130%-185%)



Source: North Carolina Department of Public Instruction

298

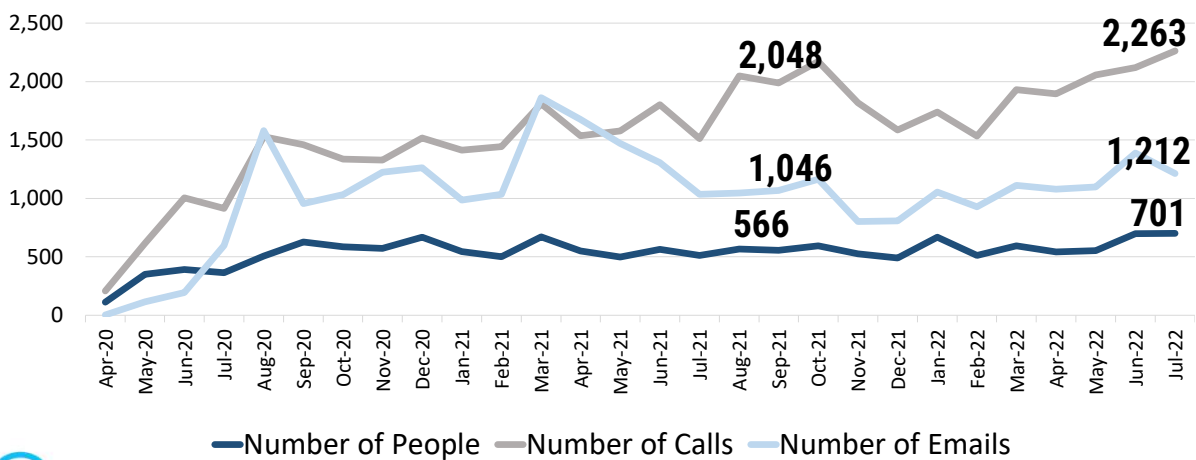
Homelessness



299

Orange County Housing Helpline Use Grows

Orange County Partnership to End Homelessness Housing Help Line monthly phone and email traffic



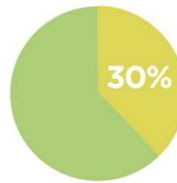
Source: Orange County Housing and Community Development

300



The 2021 Housing Need in Orange County

Housing is affordable when it comprises no more than **30% of the family's budget**. Families that spend more than this on housing are **cost-burdened**.



Cost of housing  or 
Energy and utilities 



30% of Orange County are **cost-burdened**
15,817 households

Renters who have difficulty affording their homes:



48%
9,553 households

Homeowners who have difficulty affording their homes:



19%
6,264 households

301

Average Annual Salaries

\$45,360 income needed to afford a two-bedroom apartment



Food prep and service
\$26,300



Childcare
\$26,530



Retail sales
\$26,690



Healthcare
\$32,270



Construction
\$32,590



Teacher
\$49,780



Police officer
\$53,080

*Statistics from the American Community Survey and the Bureau of Labor Statistics.

\$86,400 Area Median Income (AMI) for Orange County

Affordable communities are healthier communities with opportunity for all

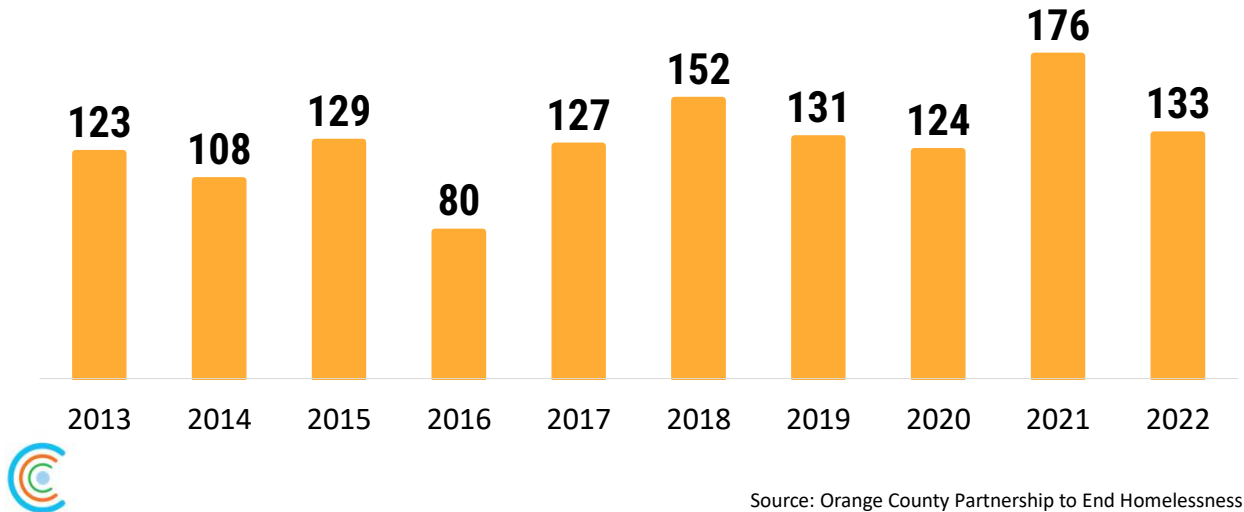
The mission of the North Carolina Housing Coalition is to lead a movement to ensure that every North Carolinian has a home in which to live in dignity and opportunity.

Be part of the solution. Find out how: 919.881.0707 | nchousing.org

302

Number of Individuals Experiencing Homelessness Drops in 2022

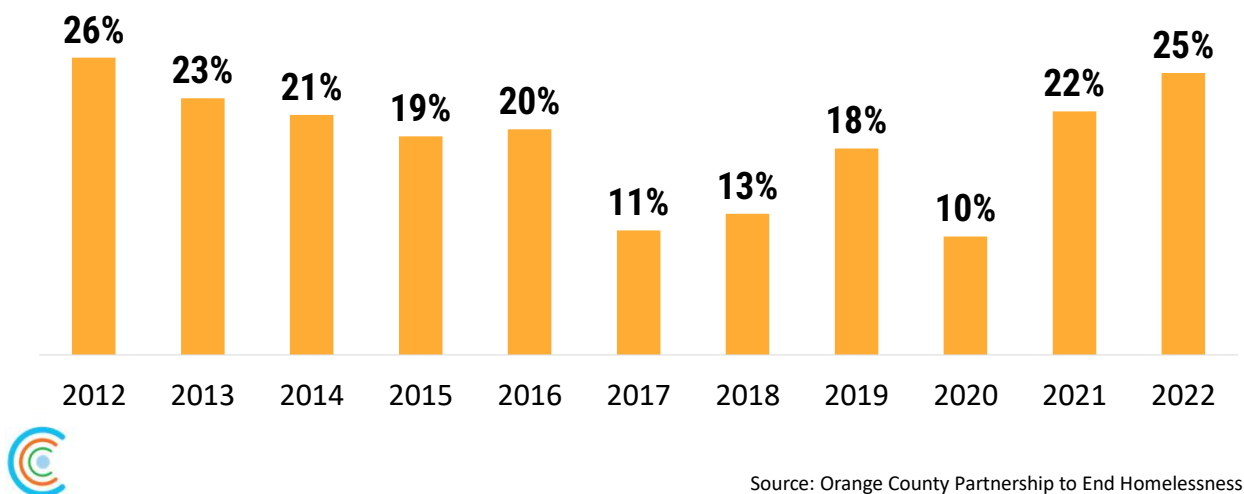
Orange County Annual Point in Time Count, 2012 - 2022



303

Share of Orange County Homeless who are Chronically Homeless Rises to 25%

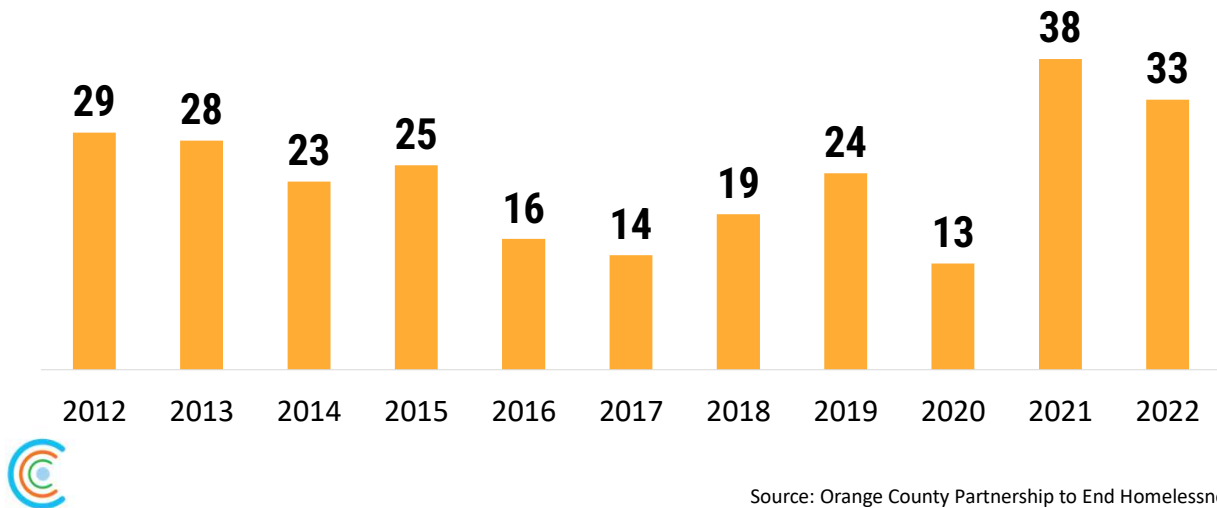
Chronic homelessness is defined as an individual with a disabling condition who has experienced homelessness for longer than a year (during which time the individual may have lived in a shelter, or a place not meant for human habitation)



304

Number of Orange County Chronically Homeless Individuals Declines Slightly

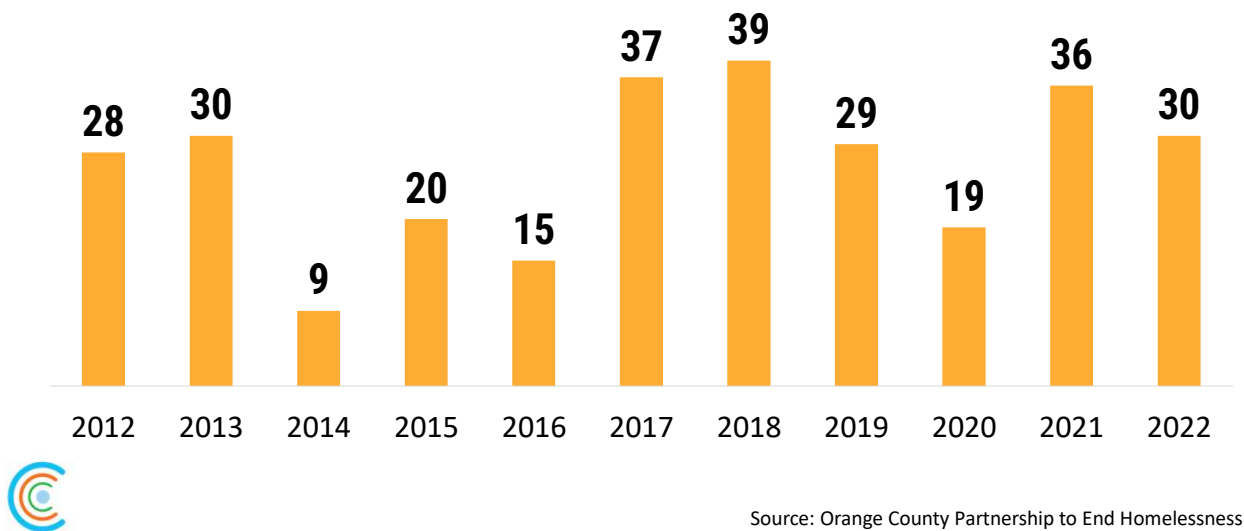
Total chronically homeless individuals identified during Orange County Annual Point in Time Count, 2012-2022



305

30 Individuals Unsheltered in Orange County in 2022

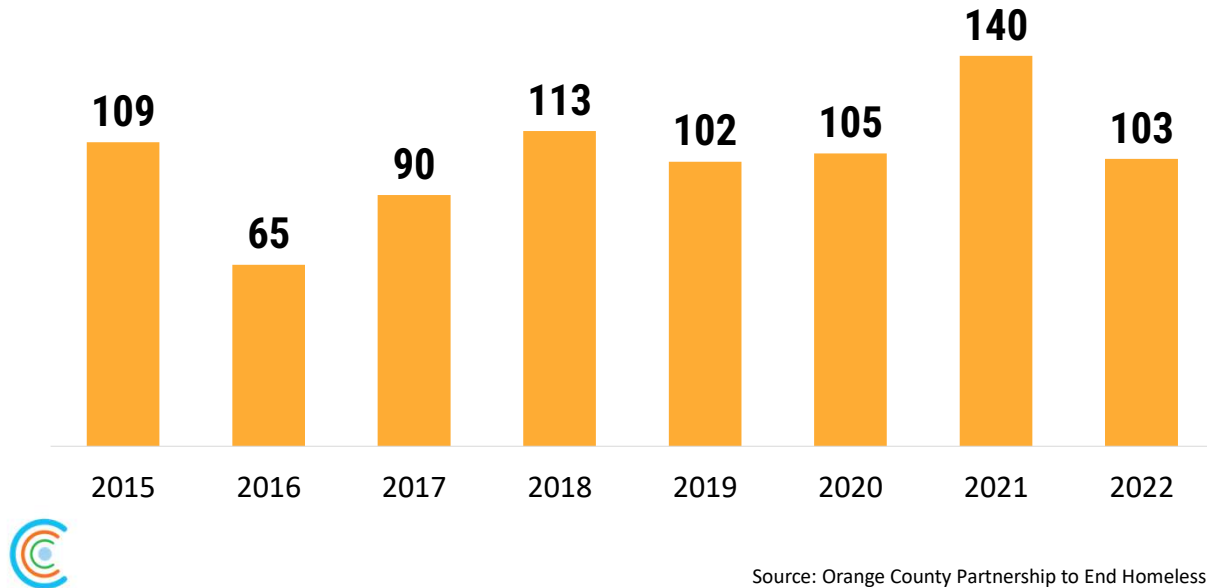
Number of unsheltered individuals identified during Orange County Point in Time Count, 2012 to 2022



306

People Experiencing Homelessness Housed

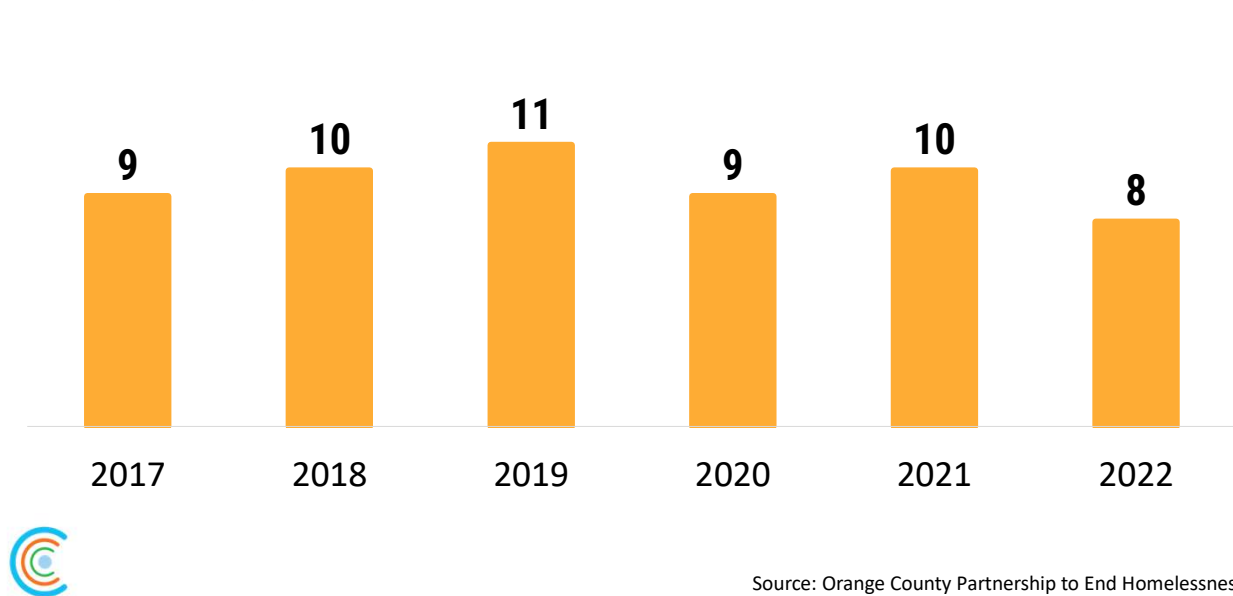
Number of sheltered homeless, Orange County Annual Point in Time Count



307

Orange County Homeless Families

Orange County Annual Point in Time Count, 2017-2022



308

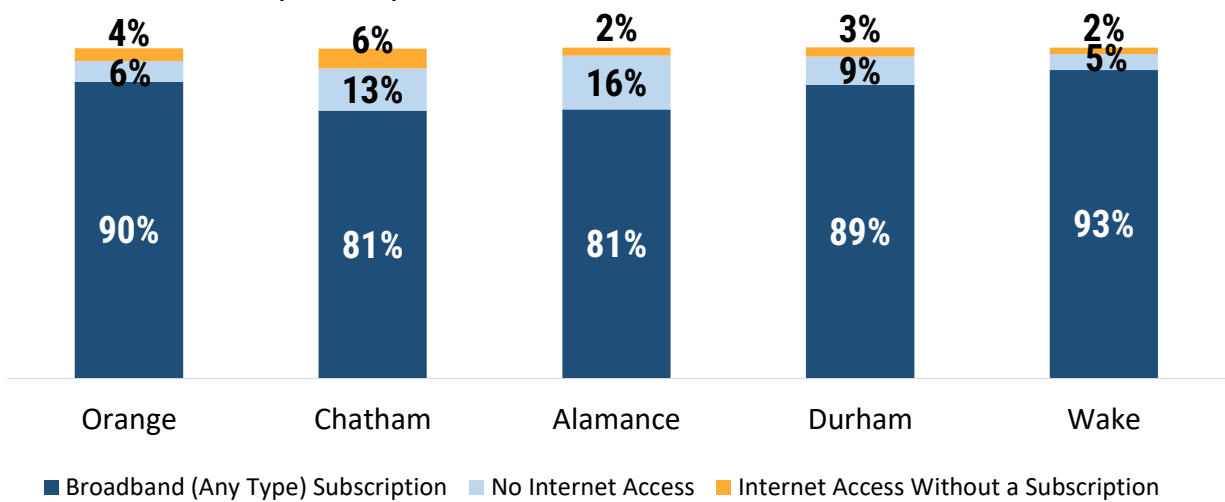
Internet Access



309

Household Home Internet Access Varies by County

Internet access by county



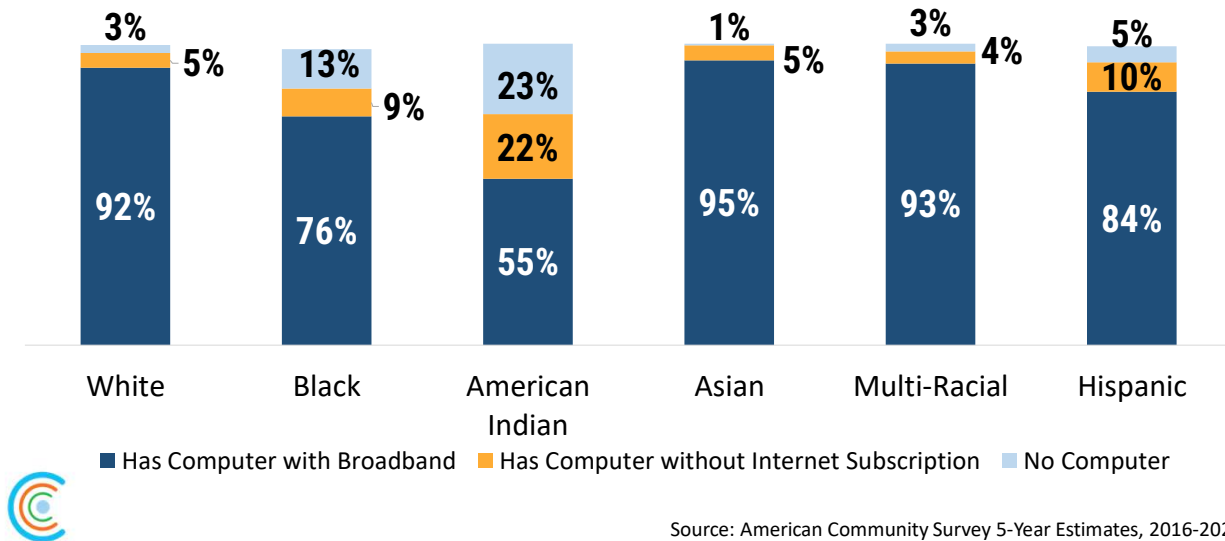
Note: All counties have less than 1% using dial-up

Source: American Community Survey 5-Year Estimates, 2016-20

310

In Orange County, 22% of Black Households & 15% of Hispanic Households Lack a Computer or Internet Access

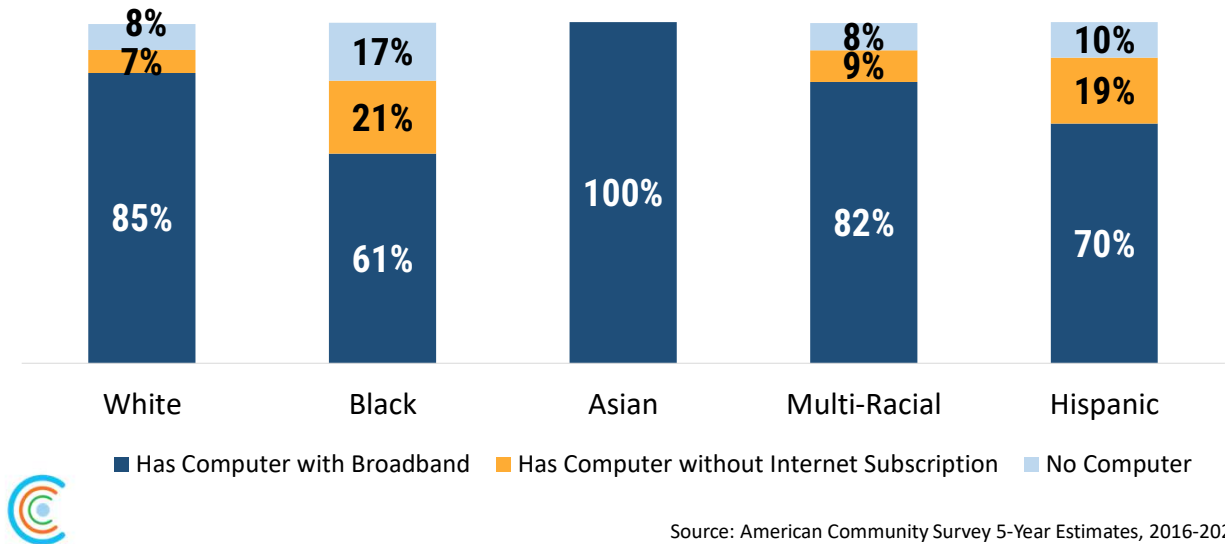
Orange County personal computer & internet access by race/ethnicity



311

In Chatham County, 38% of Black Households & 29% of Hispanic Households Lack a Computer or Internet Access

Chatham County personal computer & internet access by race/ethnicity



312

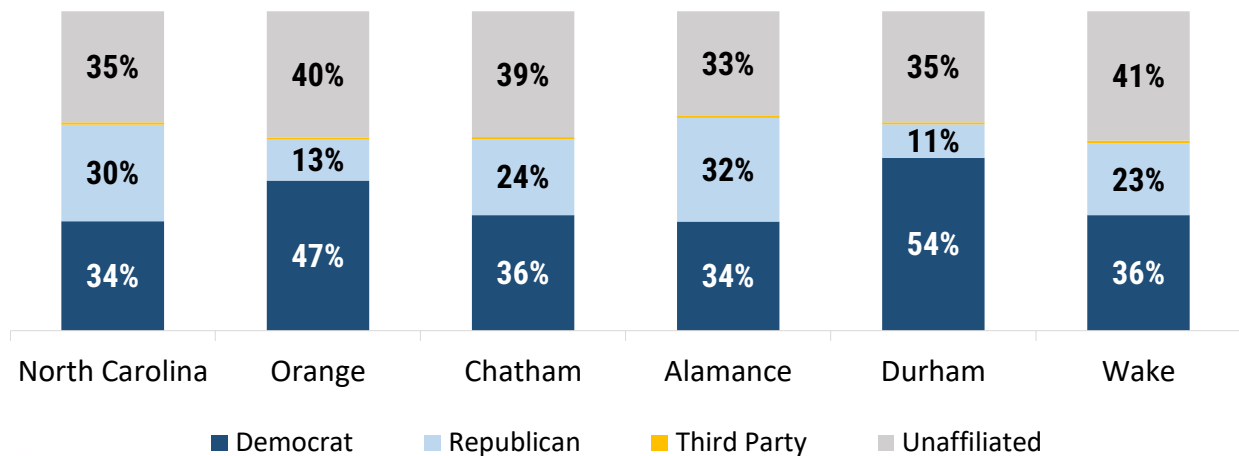
Voter Registration



313

Unaffiliated Voter Registration Exceeds 40% in Wake and Orange

Registered voters by affiliation, 5/28/2022



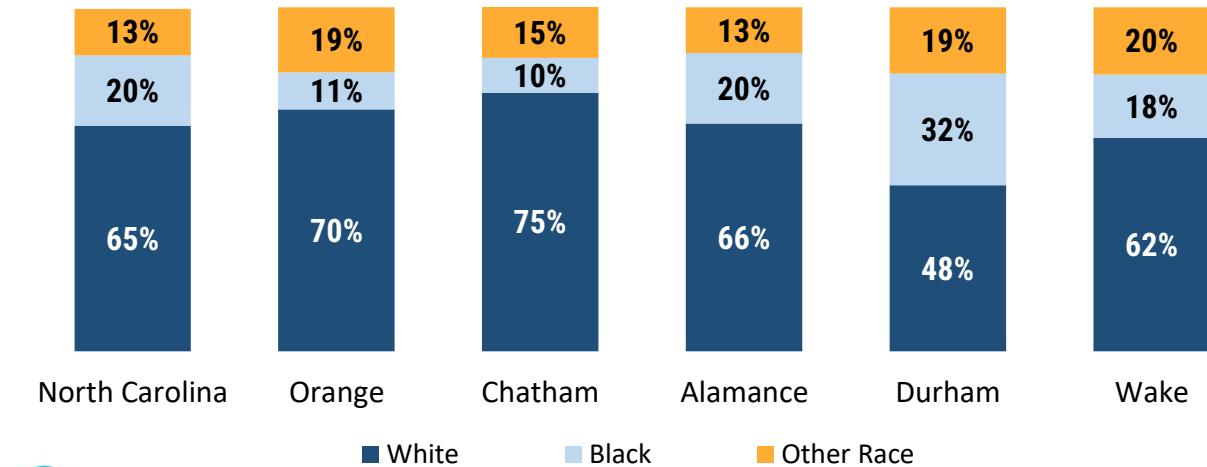
Note: values less than 1% not labeled

Source: North Carolina State Board of Elections

314

Orange and Chatham Counties Have the Smallest Share of Black Voters Compared to Peers and the State

Registered voters by race, 5/28/2022



Source: North Carolina State Board of Elections

315

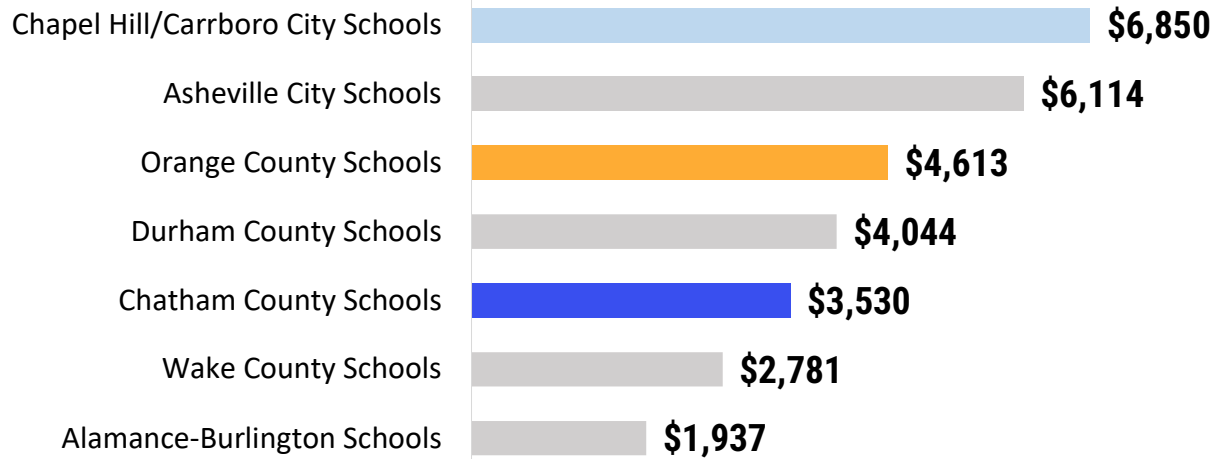
Public School Funding & Performance



316

CHCCS Leads in Local Per Pupil Expenditure

Local per pupil expenditure by Local Educational Agency (LEA) for the school year 2020-21

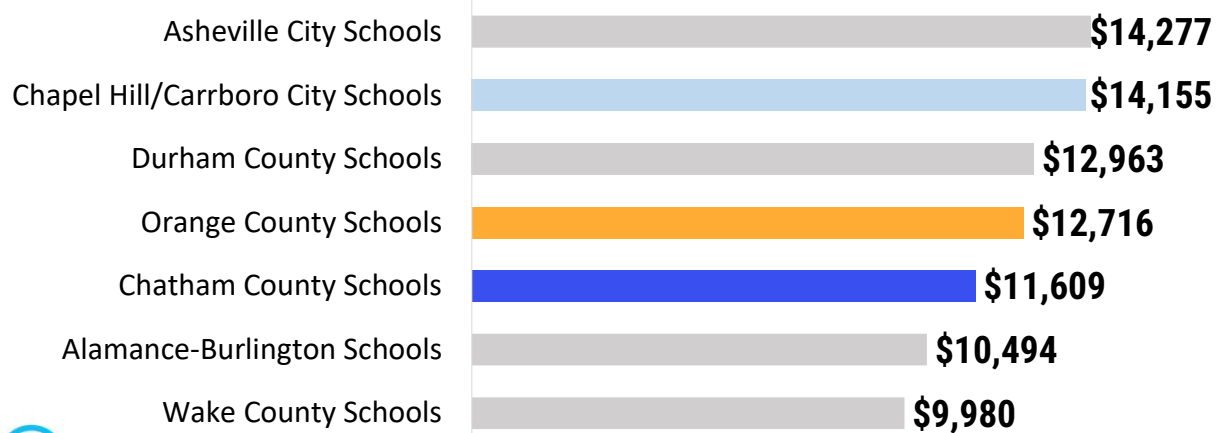


Source: NC Department of Public Instruction

317

Asheville and Chapel Hill-Carrboro Lead the State in Total Per Pupil Expenditure

Total combined (state, federal, and local) per pupil expenditure by Local Educational Agency (LEA) for the school year 2020-2021



Source: NC Department of Public Instruction

318

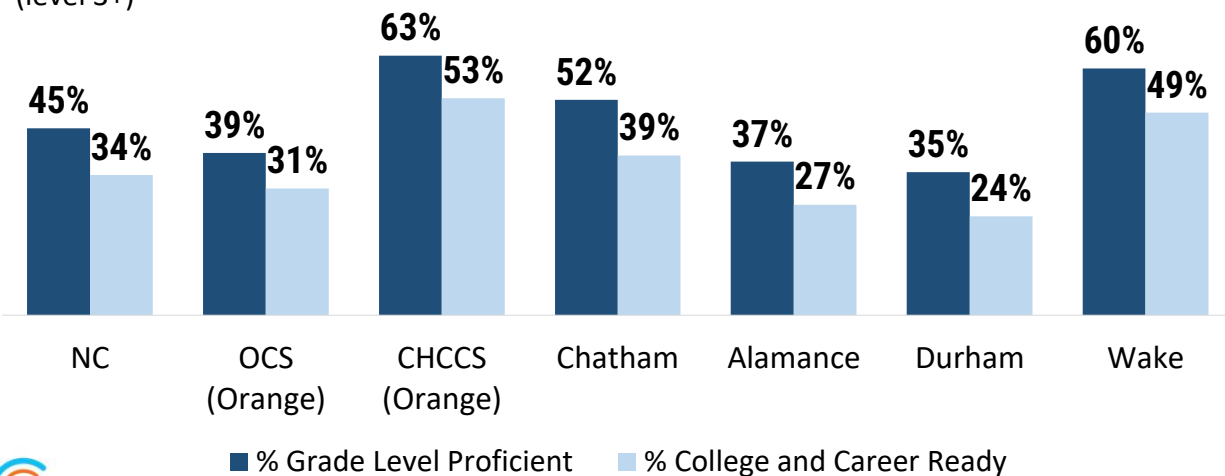
3rd Grade Reading



319

On 3rd Grade Reading End of Grade (EOG), CHCCS & Wake Outperform Neighbors SY2021

Percent of students 'College and Career Ready' (level 4 or 5) and "Grade Level Proficient" (level 3+)

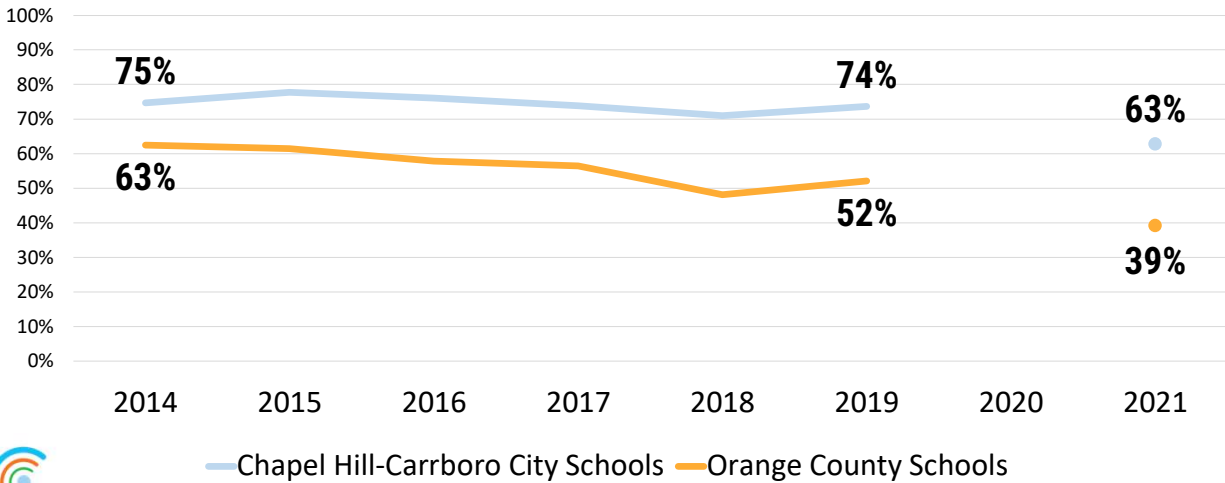


Source: NC Department of Public Instruction

320

Reading on Grade Level (Grade 3) Drops Sharply in Pandemic; Down 11 Pts in CHCCS and 13 Pts in OCS

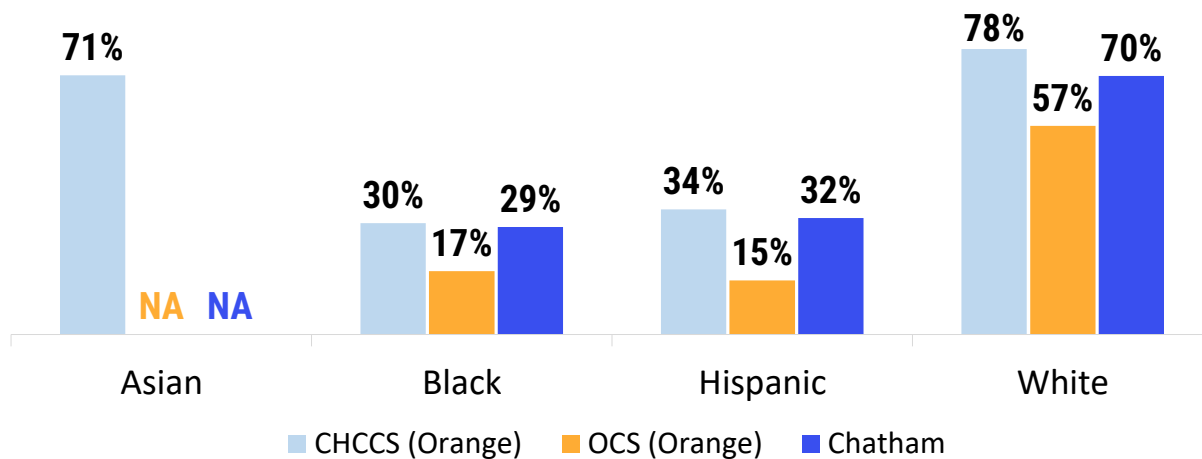
Percent of students Grade Level Proficient (level 3+) in End-of-Grade (EOG) Reading Grade 3, SY2014 to SY2021. No EOG tests were taken in 2020.



321

3rd Grade Reading: Fewer Than 17% of Black and Hispanic Students on Grade Level in OCS, Less than 34% in CHCCS

EOG Reading Grade 3 Proficiency (level 3+) by race in the school year 2020-21



322

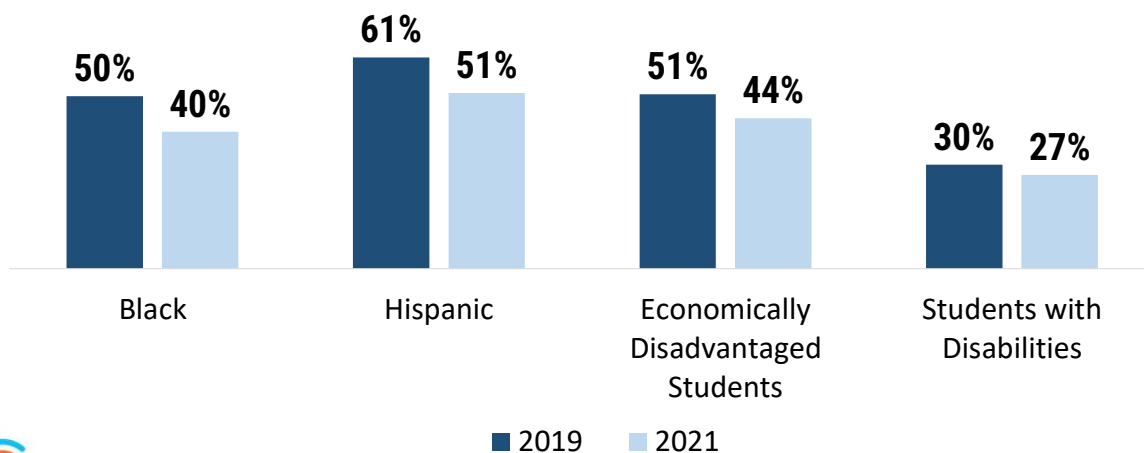
8th Grade Science



323

CHCCS 8th Grade Science EOC Performance Declines as Much as 10 Points in Pandemic

Percent of CHCCS student subgroups scoring 'College and Career Ready' (level 4 or 5) Grade 8 Science End of Course (EOC) test, SY2019 vs SY2021

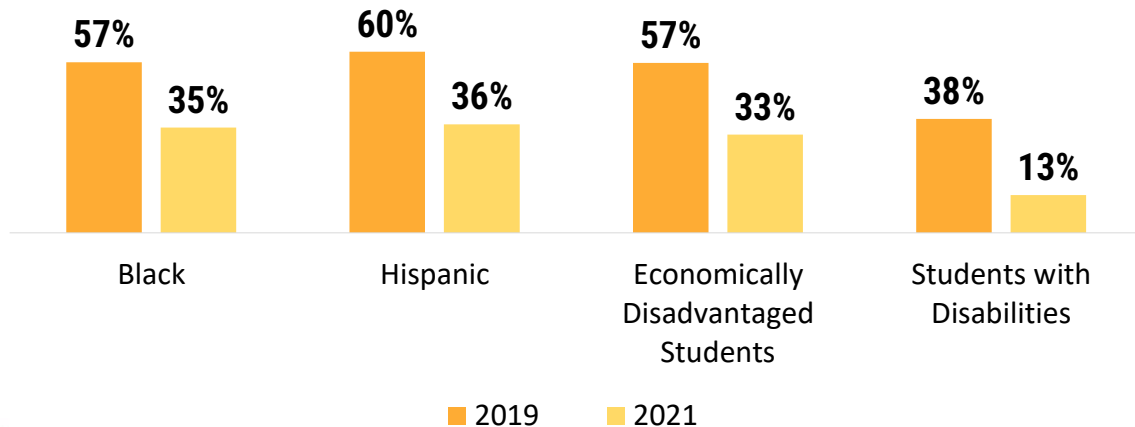


Source: NC Department of Public Instruction

324

Orange County Schools 8th Grade Science EOC Performance Declines 24 Points in Pandemic

Percent of Orange County Schools student subgroups scoring “College and Career Ready,” (level 4 or 5) on Grade 8 Science End of Course (EOC) test, SY2019 vs SY2021

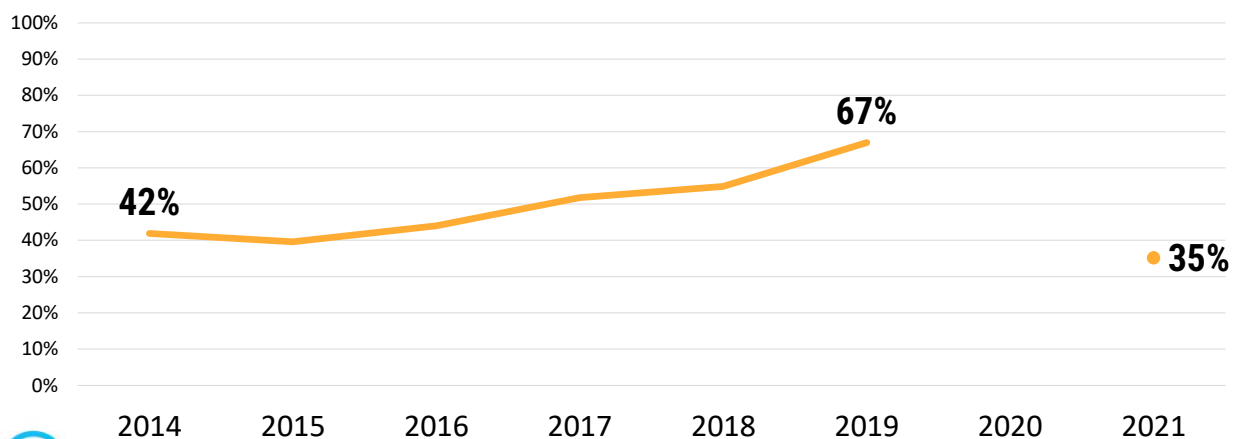


Source: NC Department of Public Instruction

325

Covid Interrupts Tremendous OCS Progress for 8th Grade Science Performance for Black Students

Orange County Schools percentage of Black students “College and Career Ready” (level 4 or 5) on Grade 8 Science EOG, SY2014 to SY2021. No EOG tests taken in 2020.



Source: NC Department of Public Instruction

326

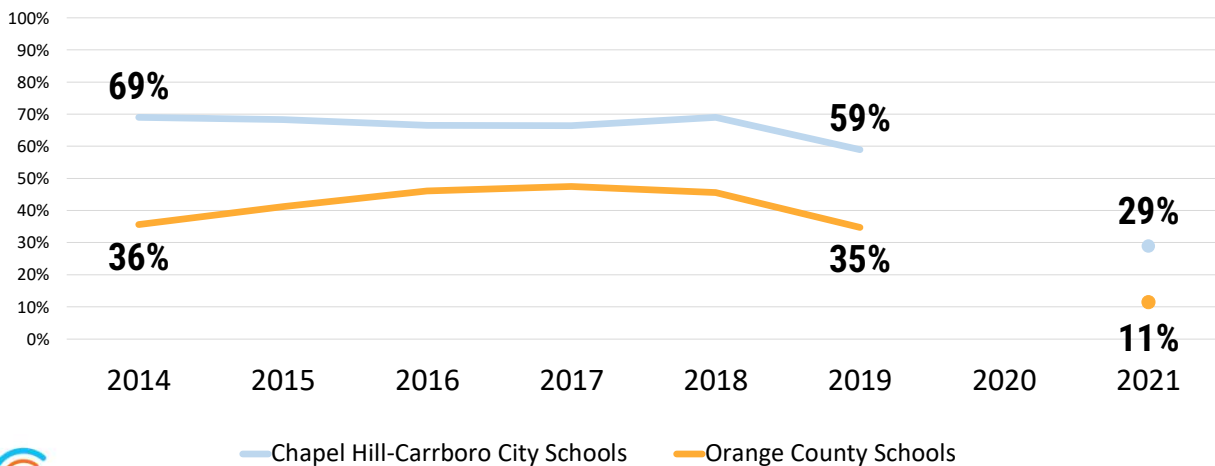
8th Grade Math



327

Grade 8 Math EOG Performance Declines Sharply in CHCCS and Orange County Schools

Percent of students College and Career Ready (level 4 or 5) in End-of-Grade (EOG) Math Grade 8, SY2014 to SY2021. No EOG tests taken in 2020.



Source: NC Department of Public Instruction

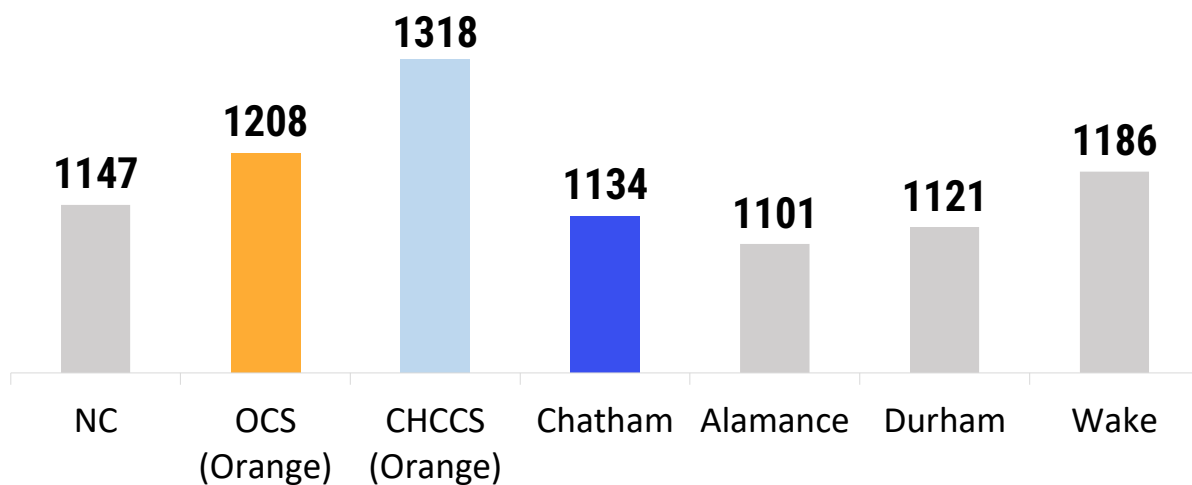
328

ACT, SAT, Graduation, & Post-Secondary Intent



329

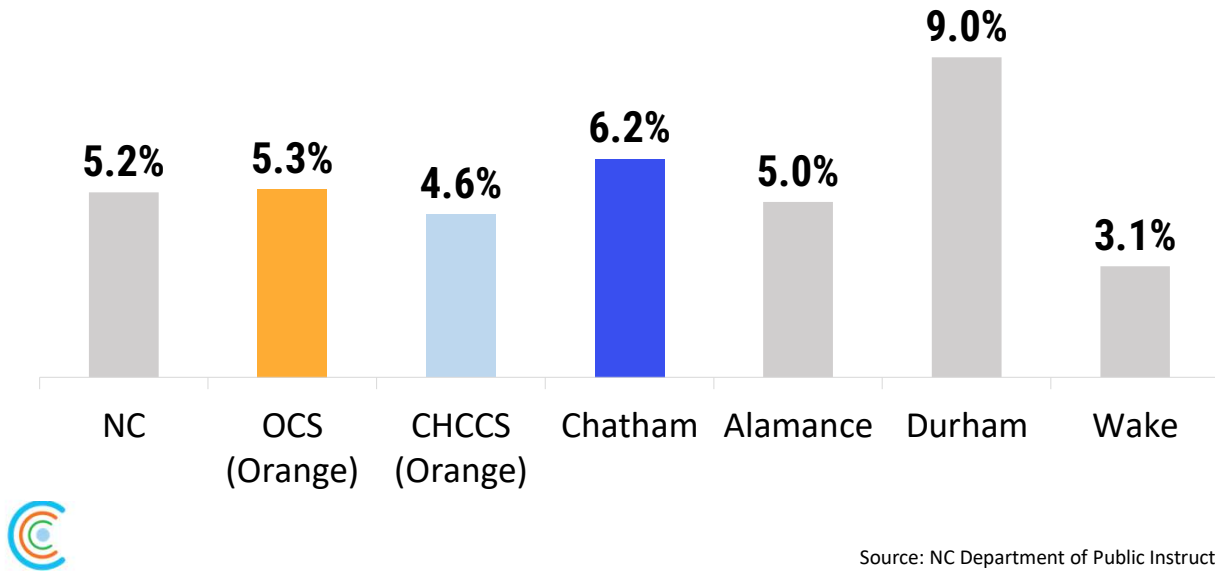
Average SAT Total Scores (2021)



Source: NC Department of Public Instruction

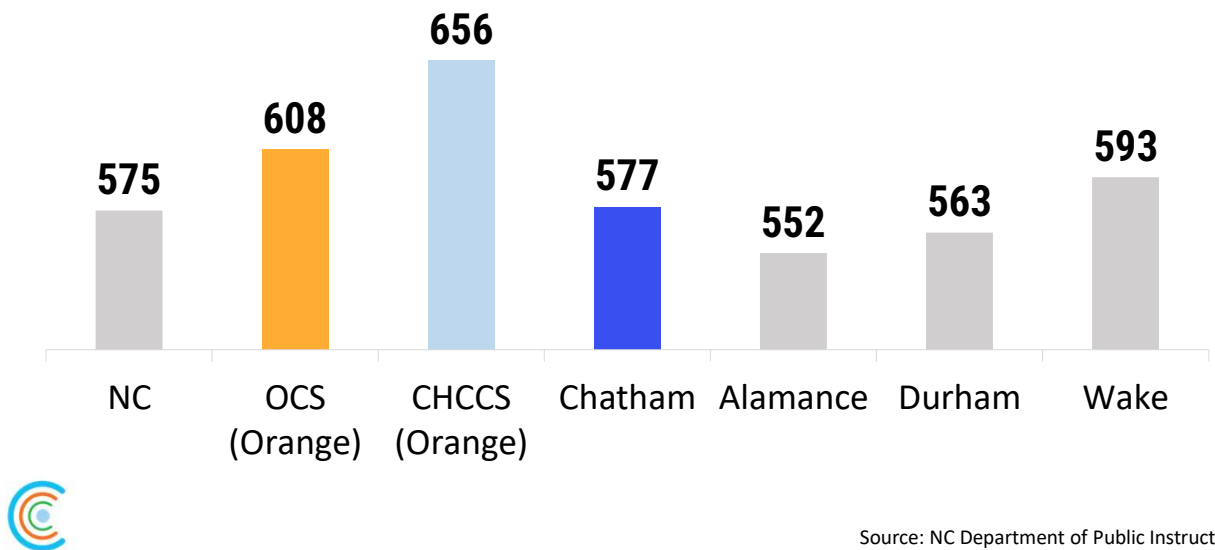
330

Change in Average SAT Total Scores 2018 to 2021



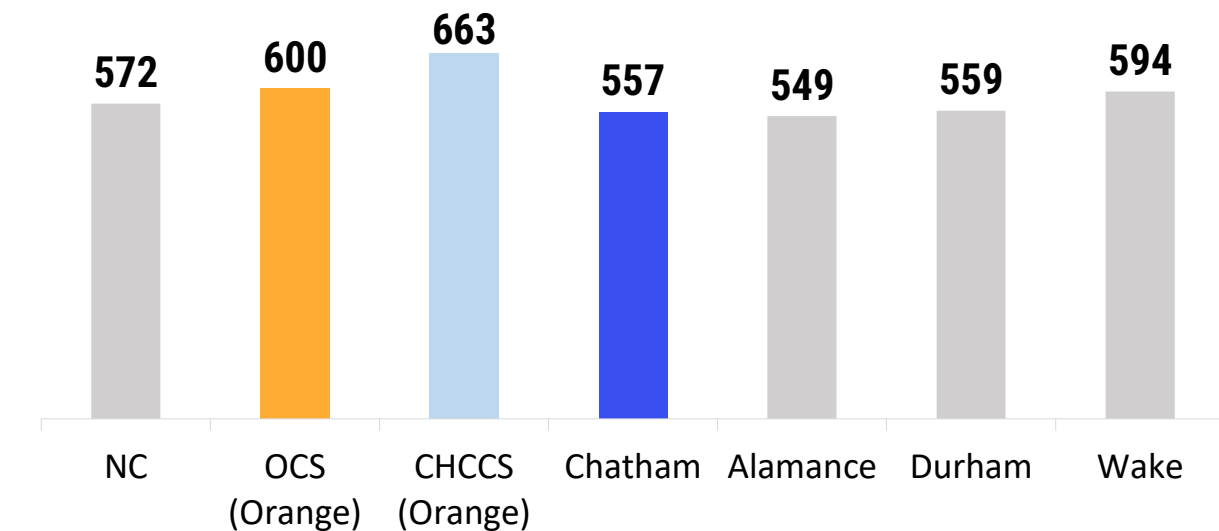
331

Average SAT Evidence-Based Reading and Writing (ERW) Scores (2021)



332

Average SAT Math Scores (2021)

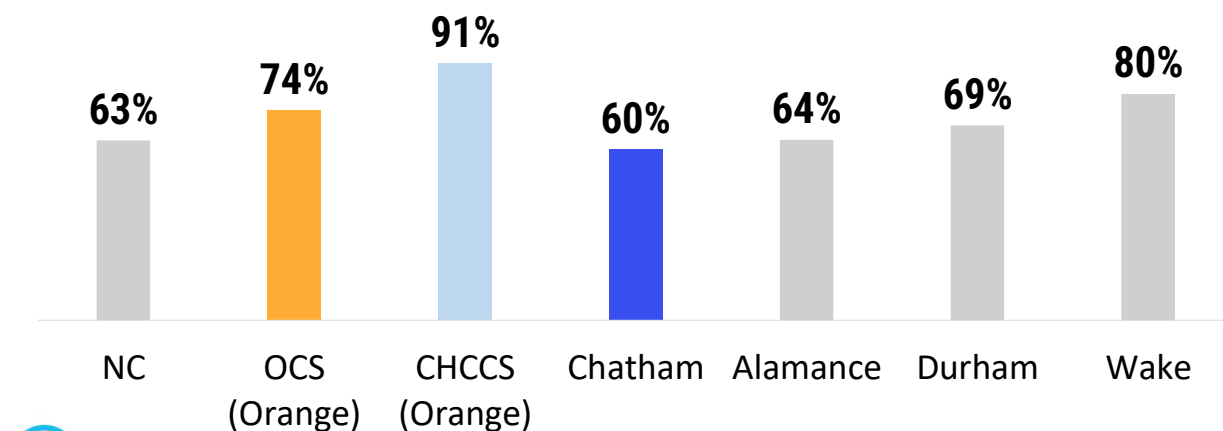


Source: NC Department of Public Instruction

333

Majority of CHCCS Students Earned “Career-Ready” Scores on ACT Work Keys Exam

Percent of Career & Technical Education students scoring Silver or higher on ACT Work Keys, SY2021

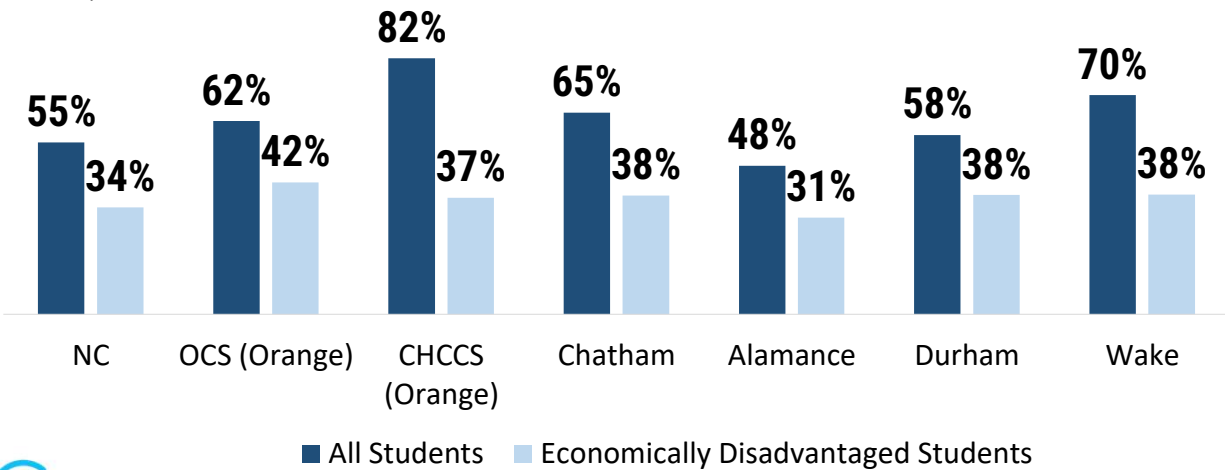


Source: NC Department of Public Instruction

334

UNC System Minimum ACT Scores (17+) Led by CHCCS, but has Widest Gaps by Income

% of students earning an UNC system-eligible ACT composite score (17+), by economic status, SY2021

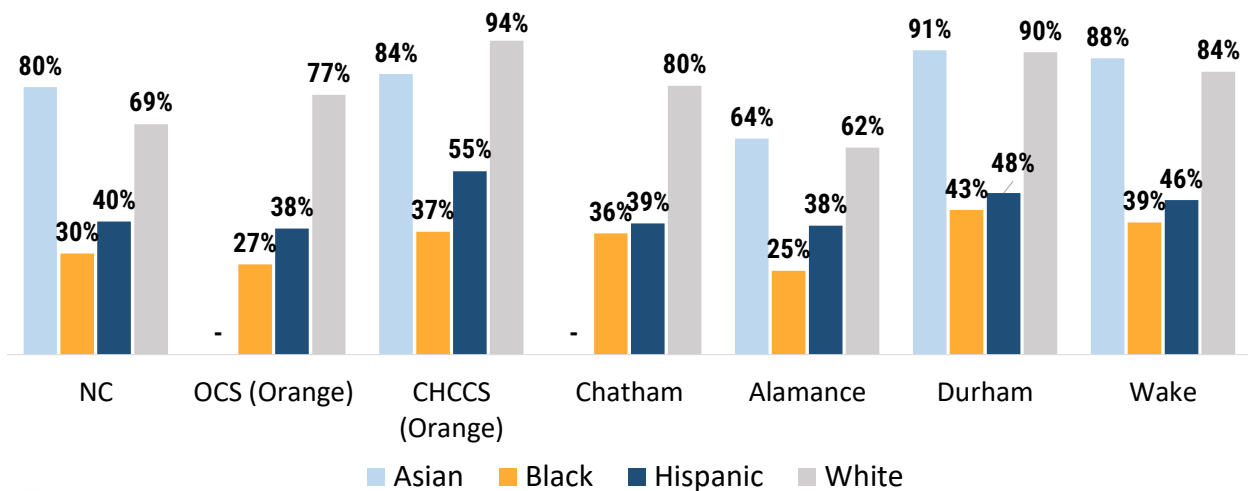


Source: NC Department of Public Instruction

335

UNC-System Minimum ACT (17+) Disparities by Race

Percent of students earning an UNC system-eligible ACT composite score (17+) by race, SY2021



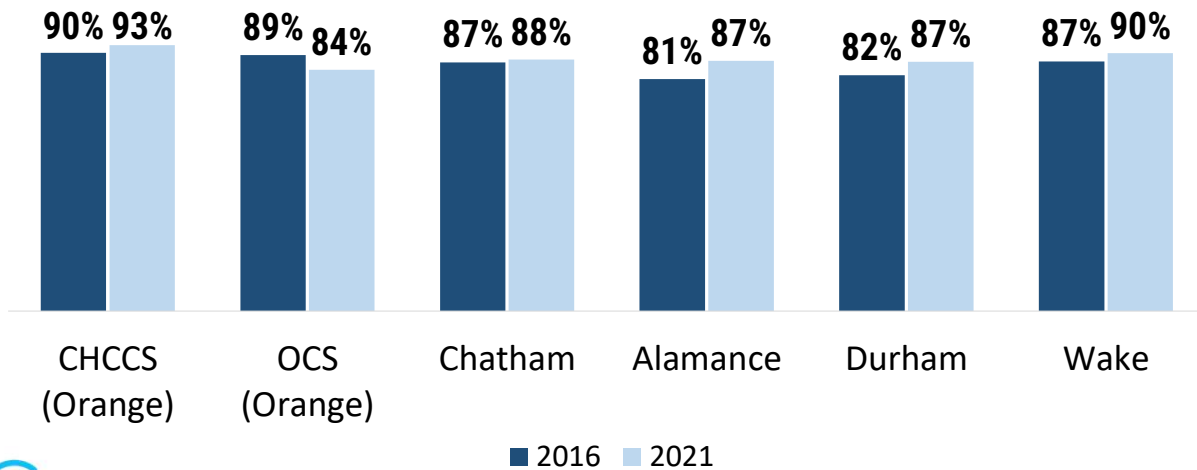
Note: Orange & Chatham County values for Asian students are not reported due to data suppression due to the small number of students in these districts.

Source: NC Department of Public Instruction

336

Local Districts' 4-Year Graduation Rates Improve, But Orange Declines Between SY2016-SY2021

Share of 9th grade cohort that graduated in 4 years, by graduation year



Source: NC Department of Public Instruction

337

4-Year Adjusted Cohort Graduation Rates

	All Students		Black Students		Hispanic Students		Economically Disadvantaged		Students with Disabilities	
	2016	2021	2016	2021	2016	2021	2016	2021	2016	2021
NC	86%	87%	83%	84%	80%	82%	80%	80%	69%	71%
Alamance	81%	87%	80%	87%	74%	86%	78%	80%	61%	71%
Chatham	87%	88%	79%	94%	79%	79%	83%	78%	68%	78%
CHCCS (Orange)	90%	93%	82%	85%	81%	86%	79%	84%	62%	74%
Durham	82%	87%	82%	86%	77%	82%	76%	79%	58%	72%
OCS (Orange)	89%	84%	90%	78%	84%	78%	79%	79%	76%	63%
Wake	87%	90%	81%	87%	74%	79%	74%	81%	71%	75%

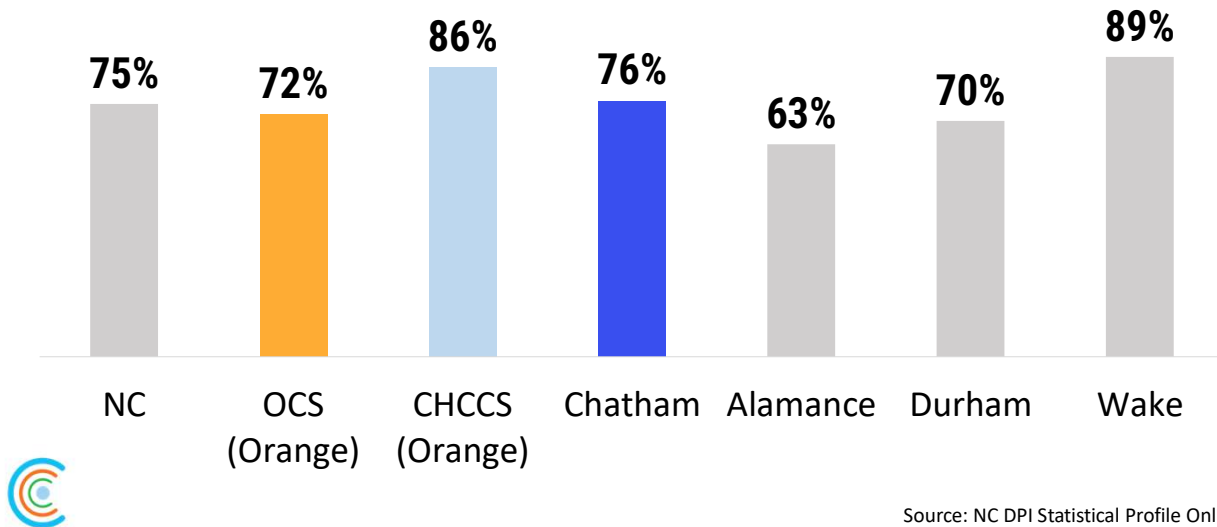


Source: NC Department of Public Instruction

338

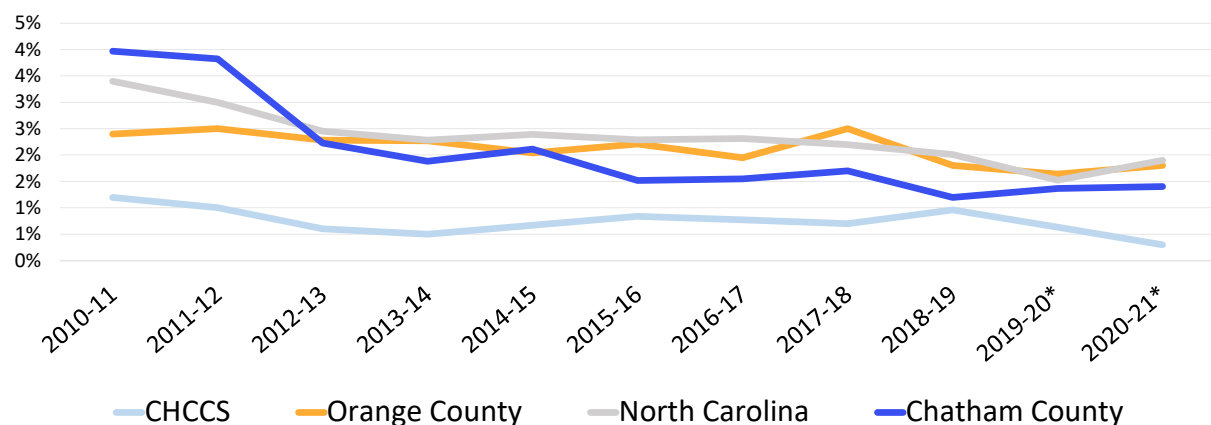
Wake County Graduates Most Likely to Report Postsecondary Intentions

Percent of high school graduates who reported intentions to enroll in postsecondary education, 2020-21



339

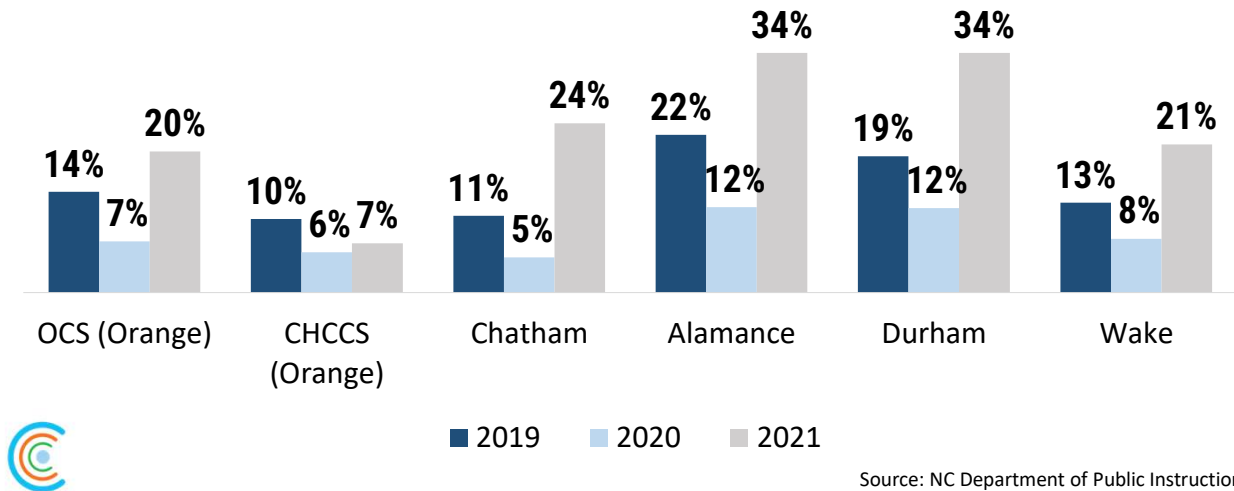
High School Dropout Rates, 2010-2021, All Now Below 2%



340

Chronic Absenteeism in CHCCS Remains Steady, Rising in Surrounding Districts

Percent of students who missed more than 10% of school days in a year, SY2019 vs. SY2020 vs. SY2021 (No attendance data collected after March 2020)



341

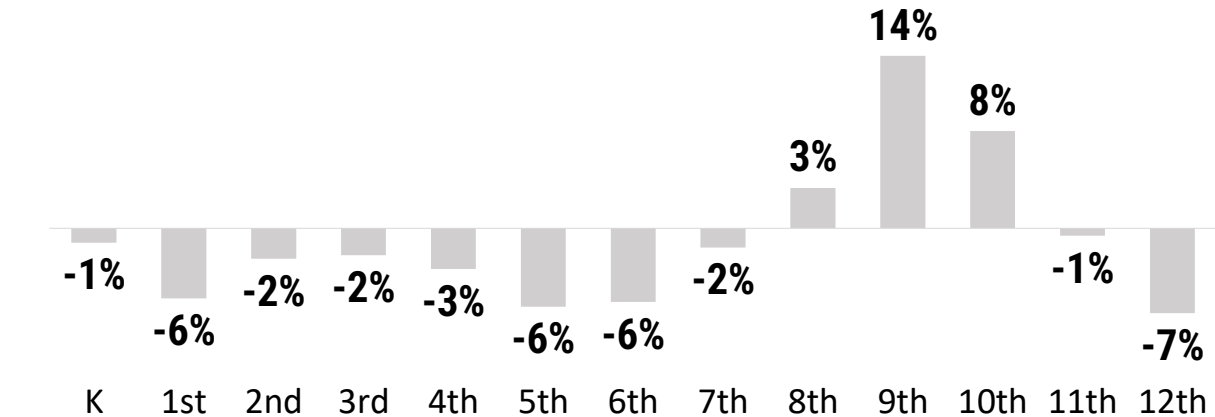
Public School Enrollment



342

North Carolina Public School Enrollment Declines in Most Grades

% increase/decrease in Month 2 Average Daily Membership by grade, SY2020 to SY2022

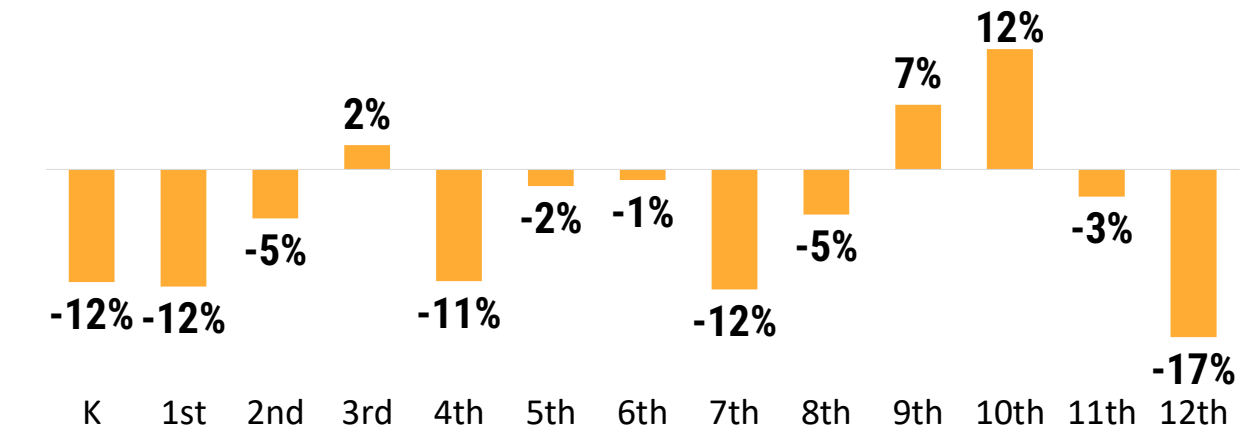


Source: Principal's Monthly Report

343

Orange County Schools Enrollment Decline Greatest in 12th Grade

% increase/decrease in Month 2 Average Daily Membership by grade, SY2020 to SY2022

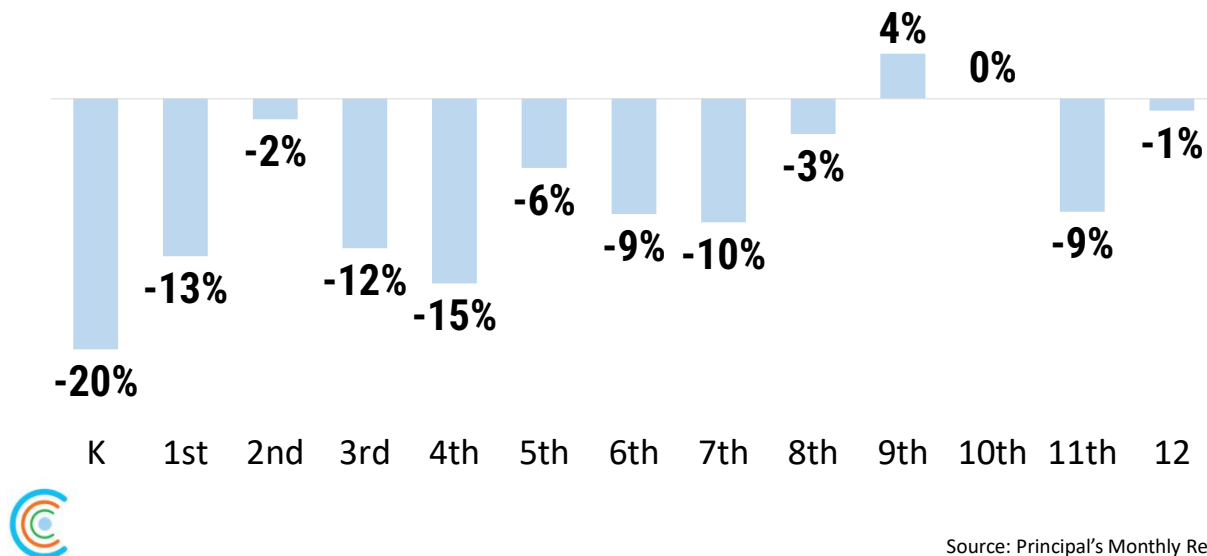


Source: Principal's Monthly Report

344

CHCCS Enrollment Down Most for Kindergarteners

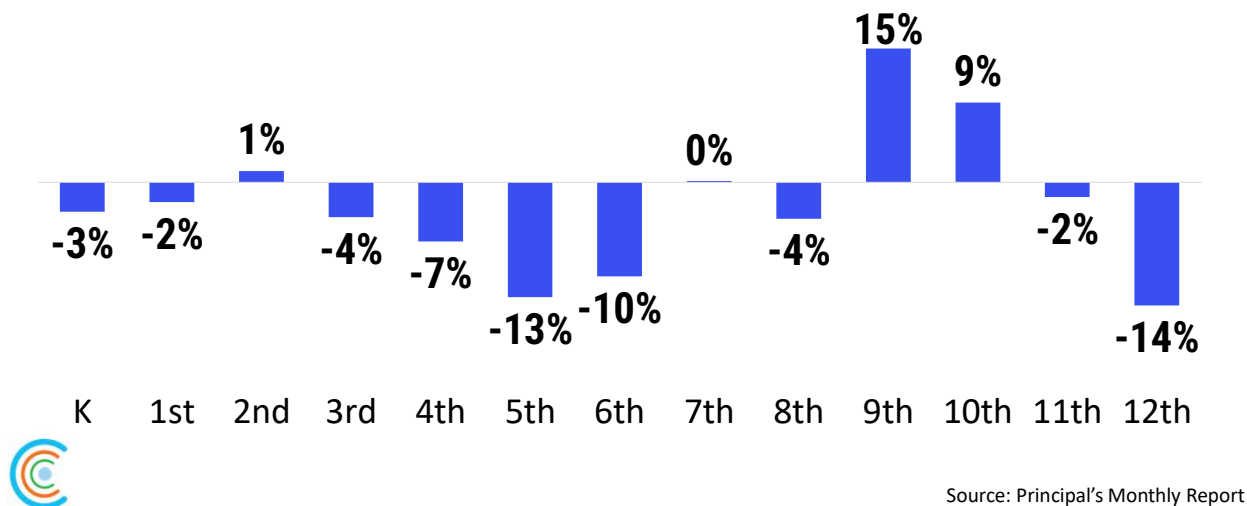
% increase/decrease in Month 2 Average Daily Membership by grade, SY2020 to SY2022



345

Chatham County Schools Enrollment Up Most for 9th Graders

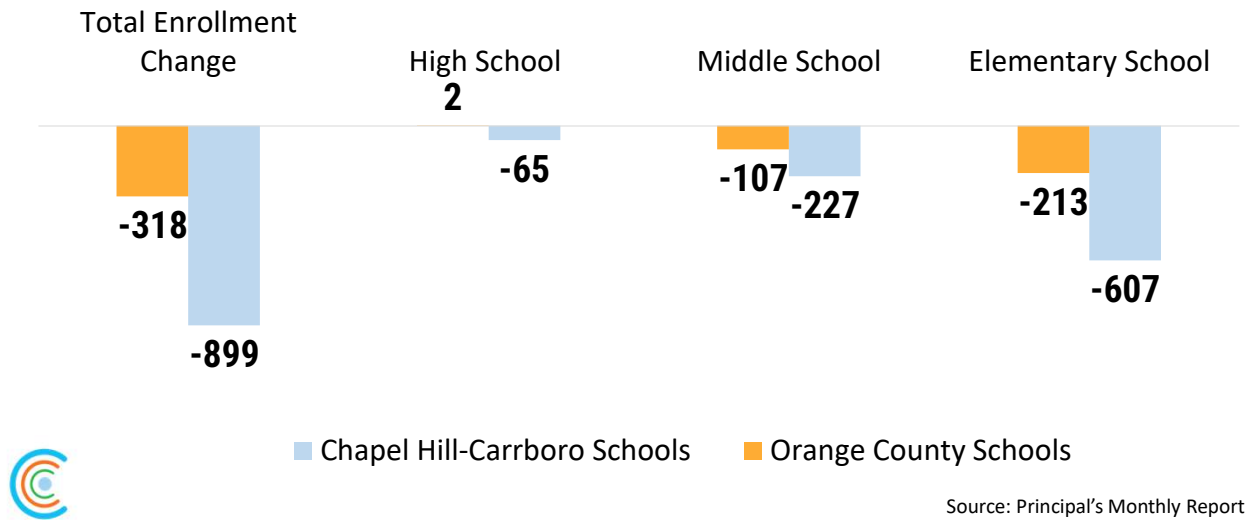
% increase/decrease in Month 2 Average Daily Membership by grade, SY2020 to SY2022



346

County-Wide Orange County Student Headcount (ADM) Declines 1,217 in Two Years Across Both Districts

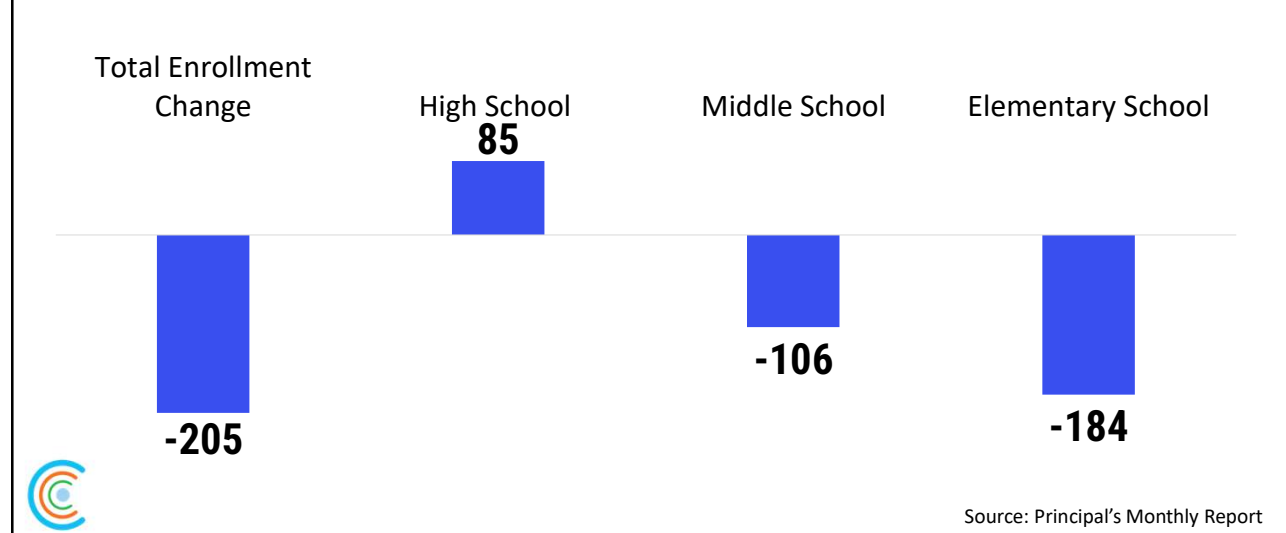
Student increase/decrease in Month 2 Average Daily Members (ADM) SY2020 to SY2022



347

Chatham County Student Headcount Drops 205 Students from the 2019-20 School Year

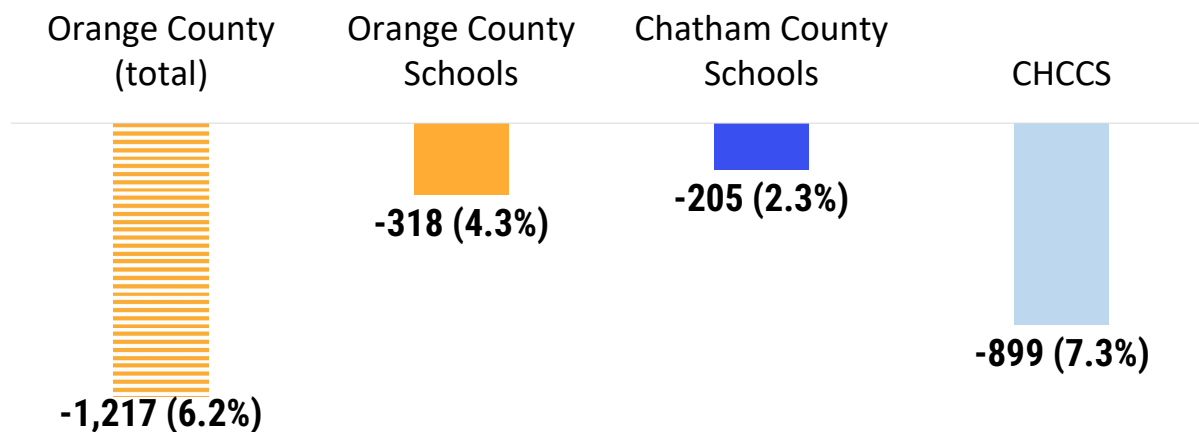
Student increase/decrease in Month 2 Average Daily Members (ADM) SY2020 to SY2022



348

Student Headcount Declines Over Two Years

Student increase/decrease in Month 2 Average Daily Members (ADM) SY2020 to SY2022

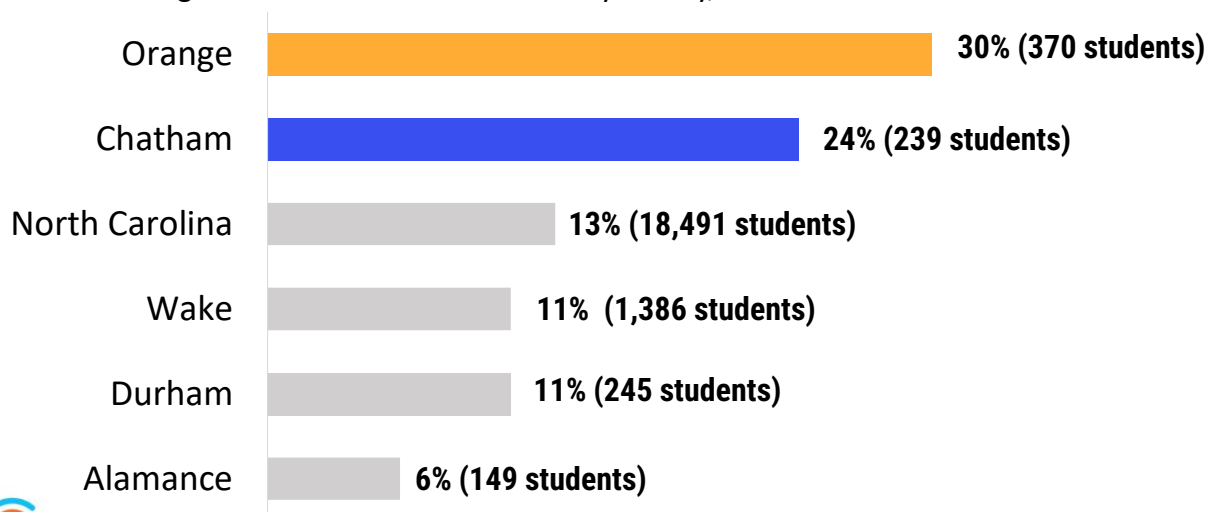


Source: Principal's Monthly Report

349

Home School Enrollments Grew Fastest in Orange County vs. Pre-Pandemic SY2019

Percent change in home school enrollments by county, SY2018-19 vs SY2021-22

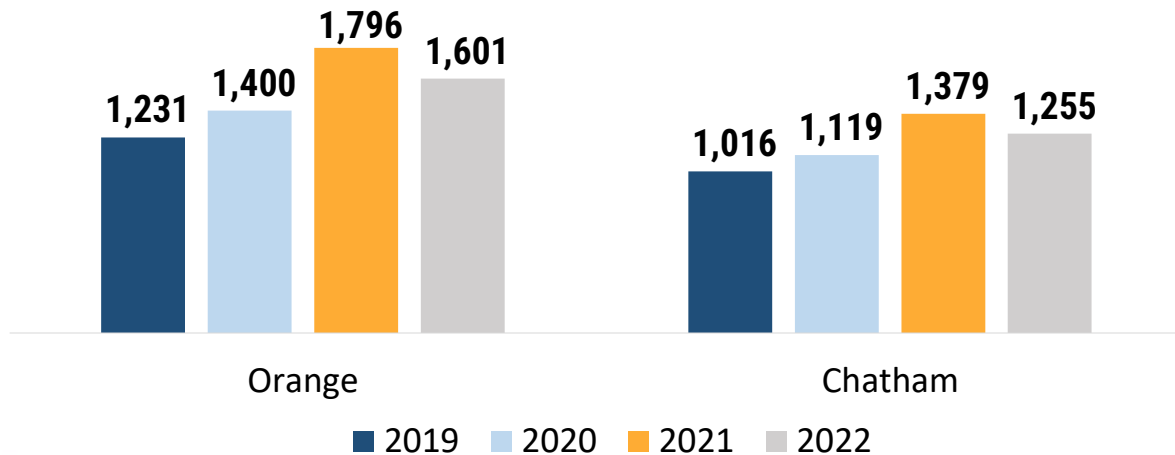


Source: NC Department of Administration

350

2022 Home School Enrollments Decline from 2021, But Remain Higher than Pre-Pandemic 2019

Number of students enrolled in home school, 2019-2022

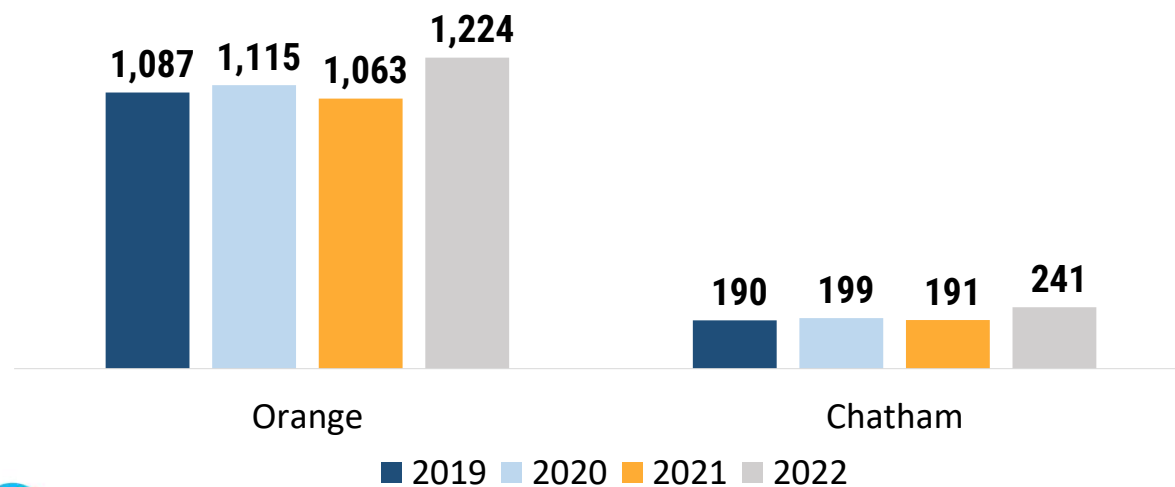


Source: NC Department of Administration

351

2022 Private School Enrollments Continue to Grow

Number of students enrolled in private school, 2019-2022

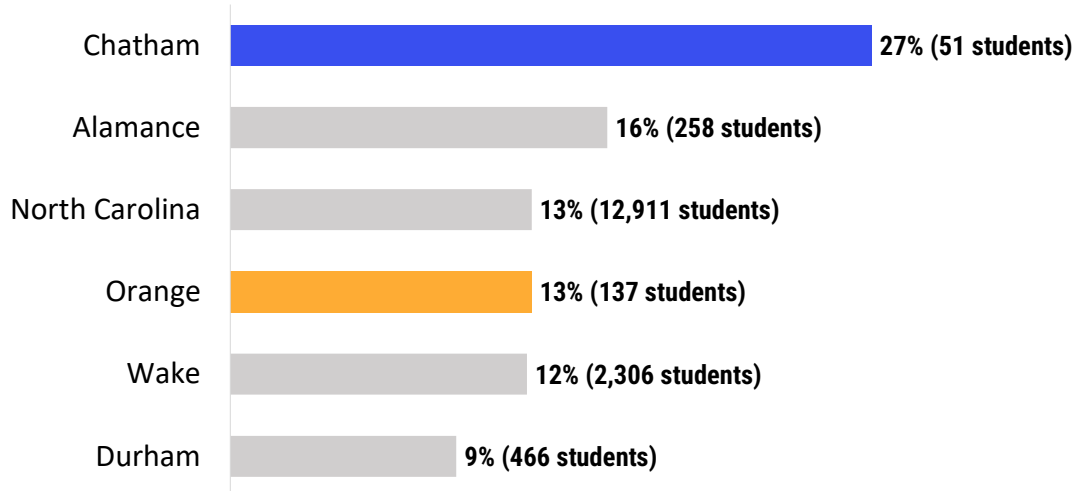


Source: NC Department of Administration

352

Private School Enrollments Percentage Growth Largest in Chatham

% change in private school enrollments from FY2018-19 vs. SY2021-22



Source: NC Department of Administration

353

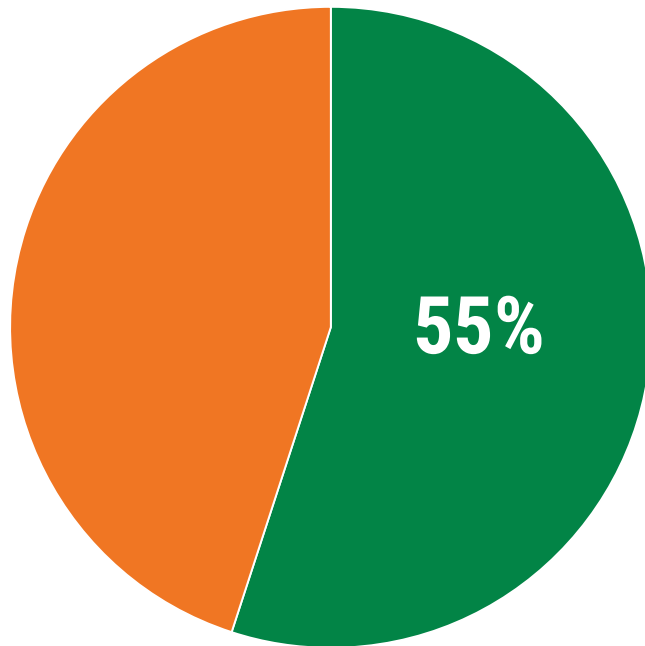
Durham Tech



354

55% of Durham Tech Students Who Graduated from High Schools in Orange County Received Financial Aid

Pell Grants and other forms of financial aid, 2021-2022

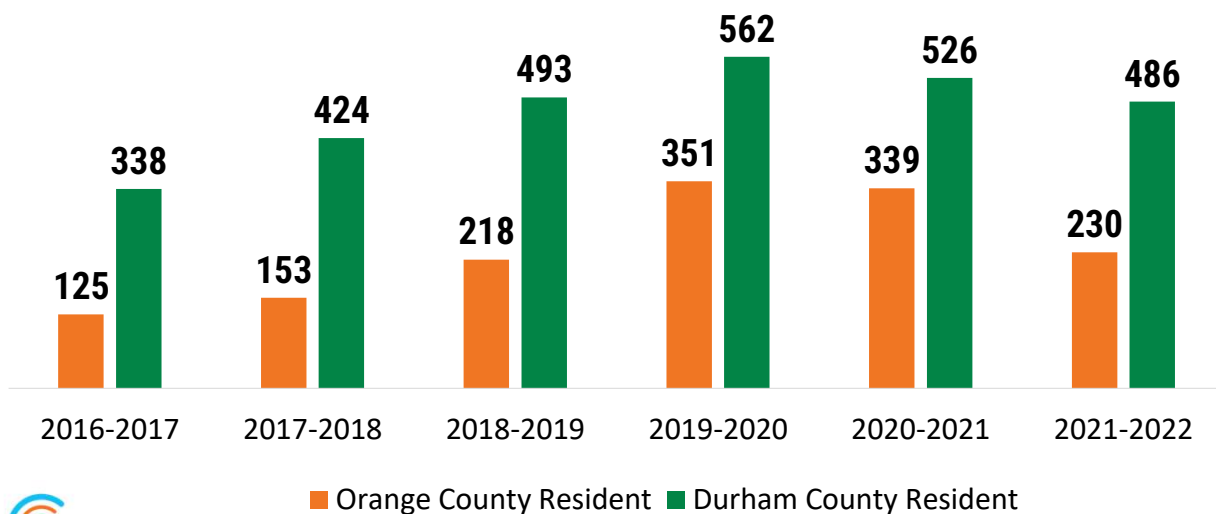


Source: Durham Tech

355

Durham Tech Dual Enrollment Declines in Pandemic

Dually enrolled students at Durham Tech by county of residence, SY2017 to SY2022

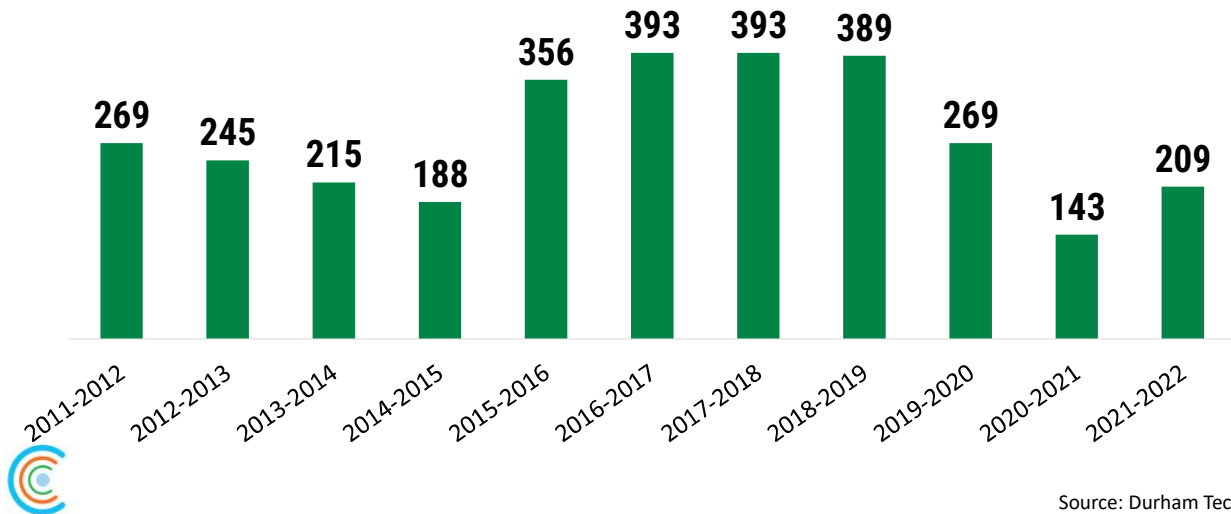


Source: Durham Tech

356

Covid Impacts Durham Tech's Orange County Continuing Education, Non-Credit Class Offerings

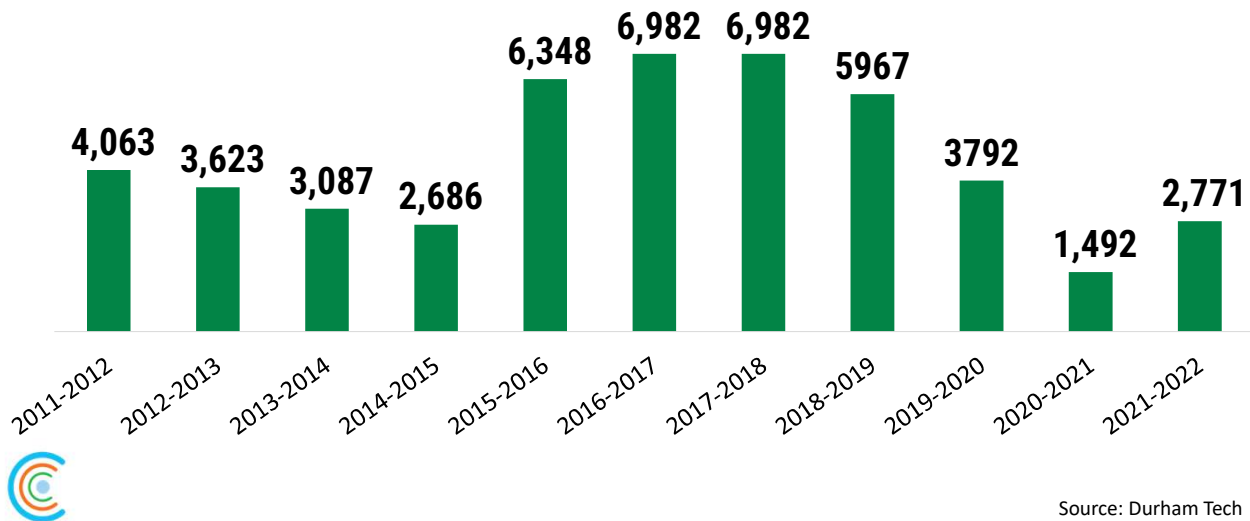
Non-credit, continuing education in person classes offered at Durham Tech's Orange County campus, SY2012 to SY2022



357

Durham Tech Continuing Education Enrollment Begins Pandemic Rebound

Continuing Education total in-person seats used, Durham Tech Orange County Campus, SY2012 to SY2022



358

Durham Tech EMT-Paramedic Students Have a 100% Pass Rate

Durham Tech licensure first-time pass rates (2021)

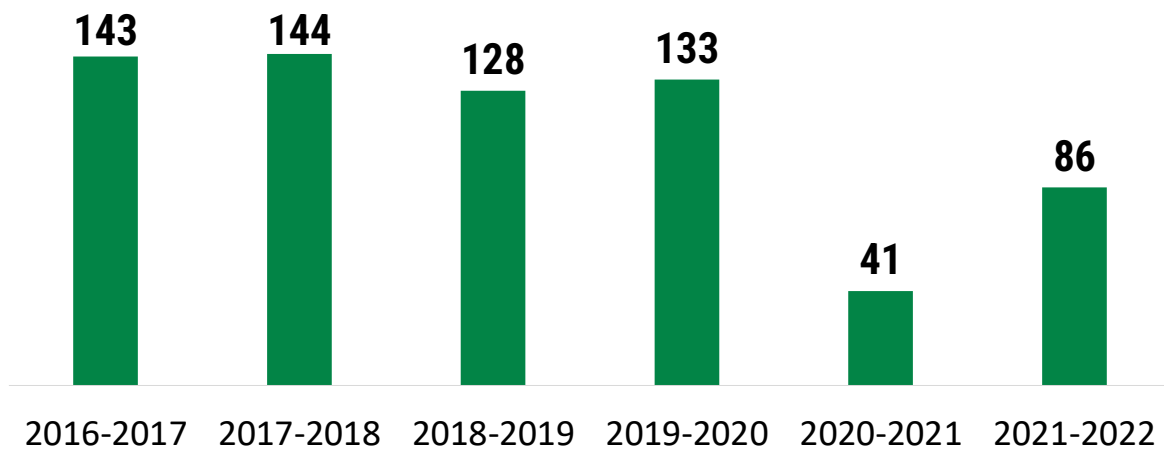


Source: Durham Tech

359

Durham Tech In-Person Offerings Decline in Pandemic

Number of in-person classes offered, SY2017 to SY2022

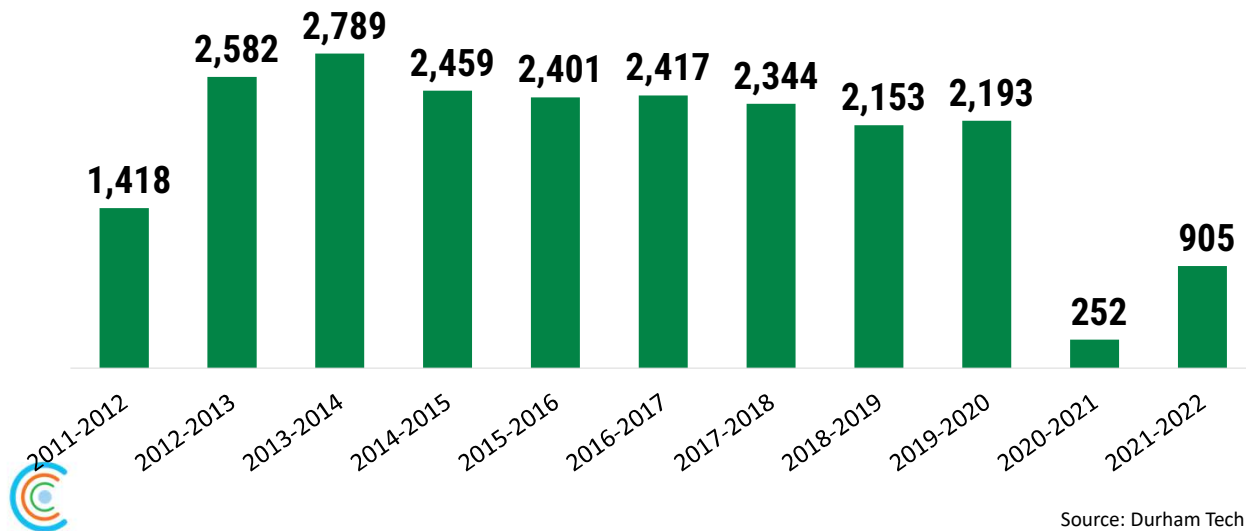


Source: Durham Tech

360

Durham Tech Orange County Campus In-Person Credit Class Enrollment Greatly Impacted by Covid-19

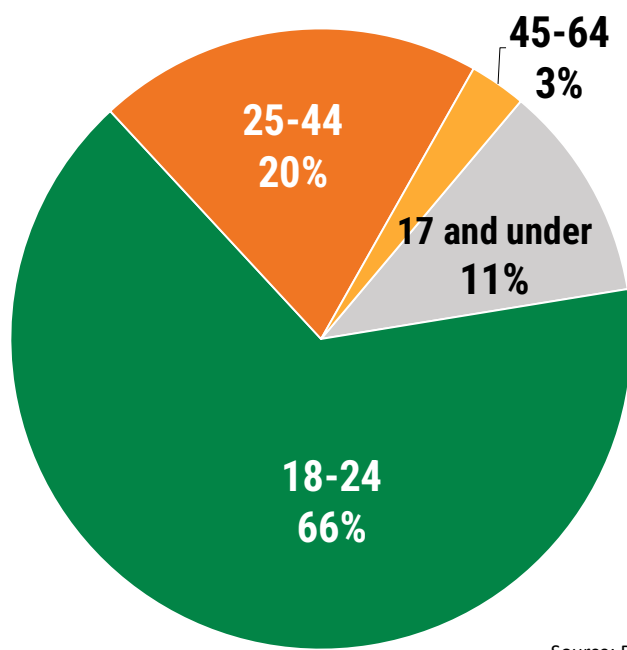
Available in-person seats used, SY2012 to SY2022



361

34% of Orange County Residents in Durham Tech Credit Classes are 25 or Older

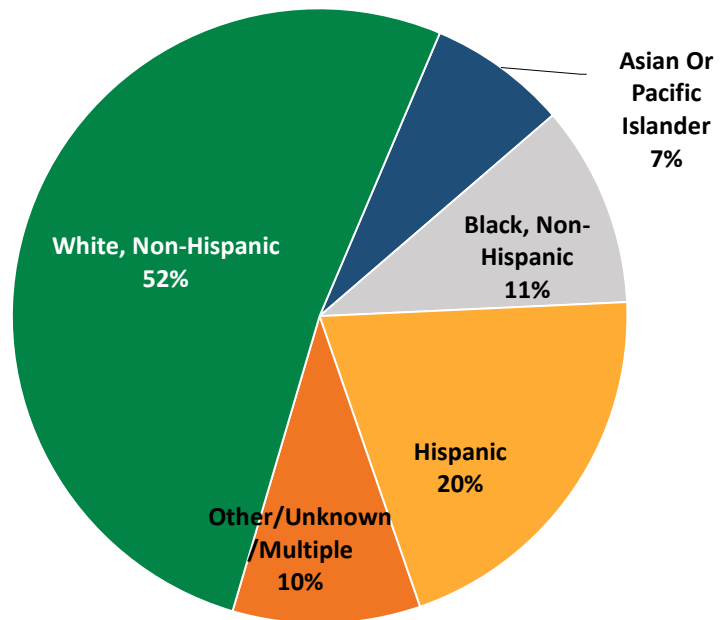
Age of Orange County Residents in Durham Tech credit classes, SY2022 (total=274)



362

48% of Orange County Residents in Durham Tech in Credit Classes are Non-White

Racial makeup of Orange County residents in Durham Tech credit classes SY2022 (total=274)



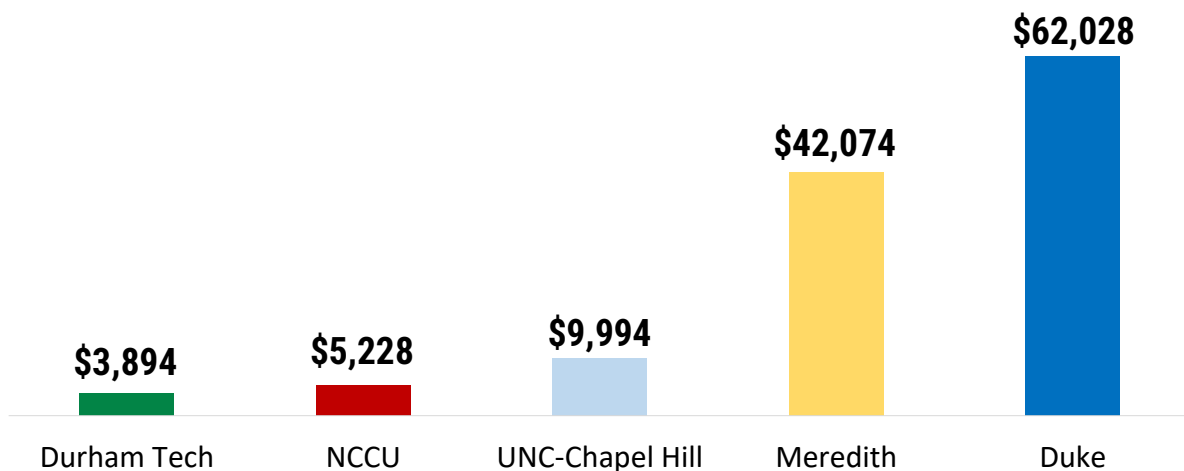
Source: Durham Tech



363

Durham Tech is the Least Expensive Local Option

Combined cost of tuition, fees, books, and supplies



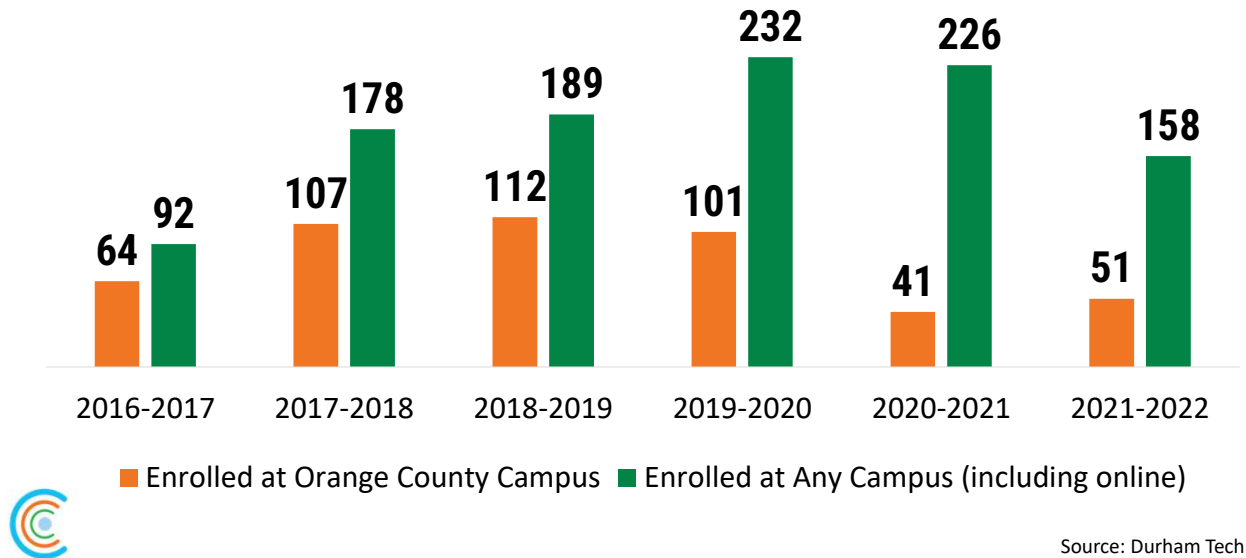
Source: Durham Tech



364

Orange Promise Remains Strong Despite Pandemic

Orange Promise credit students taking classes at Durham Tech, SY2017 to SY2022



365

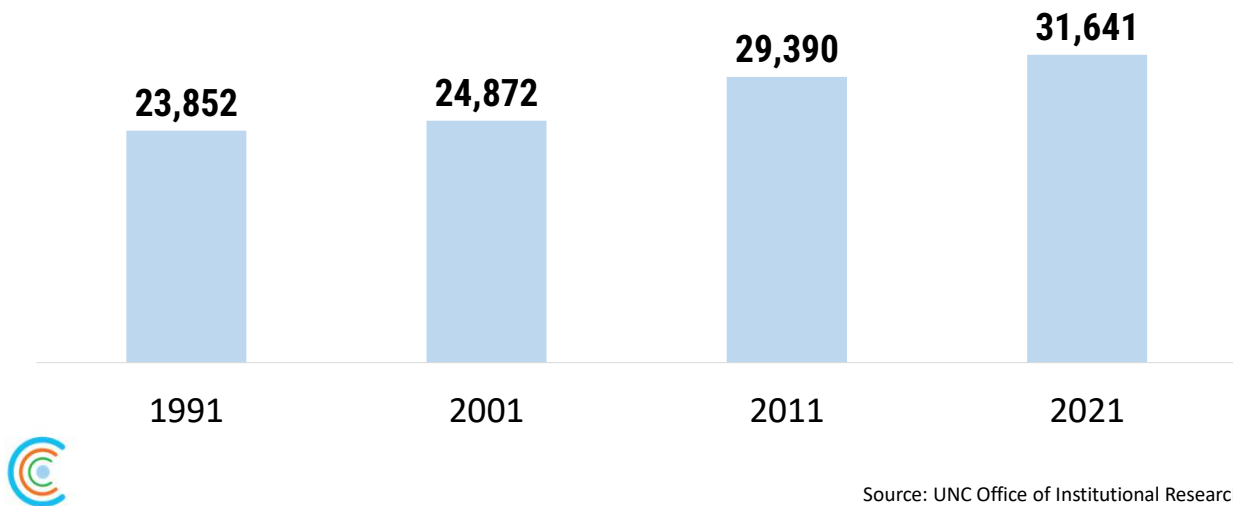
UNC Chapel Hill



366

UNC-Chapel Hill Student Population Increases to 31,641 in 2021

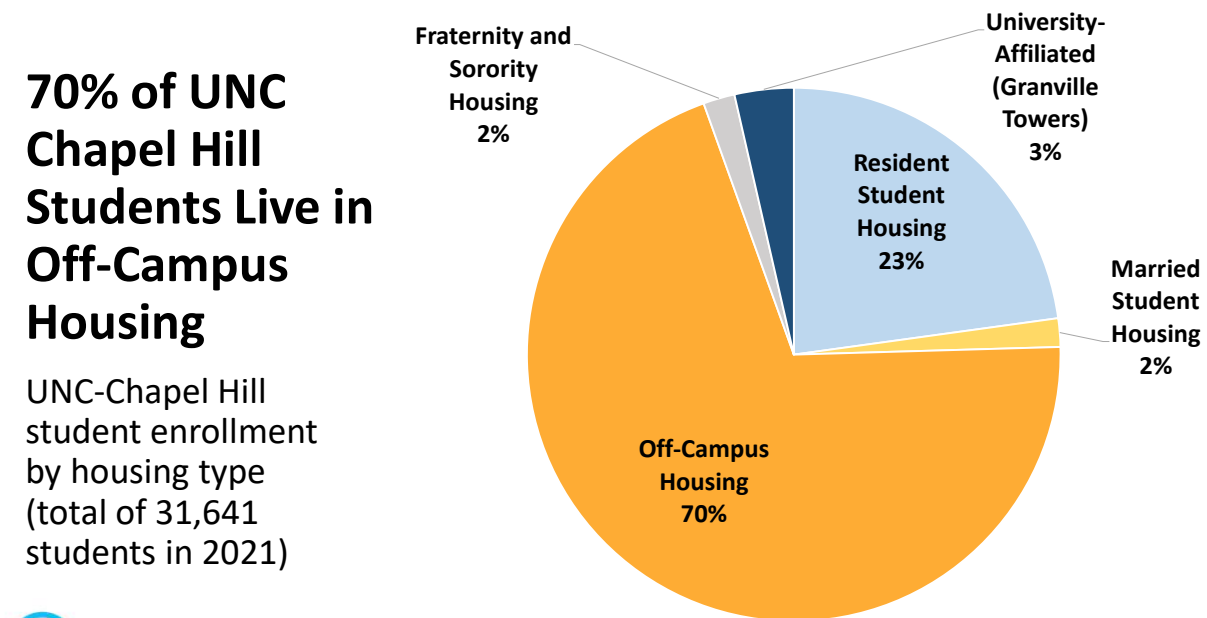
Total student population (full- and part-time), 1991, 2001, 2011, 2021



367

70% of UNC Chapel Hill Students Live in Off-Campus Housing

UNC-Chapel Hill student enrollment by housing type (total of 31,641 students in 2021)

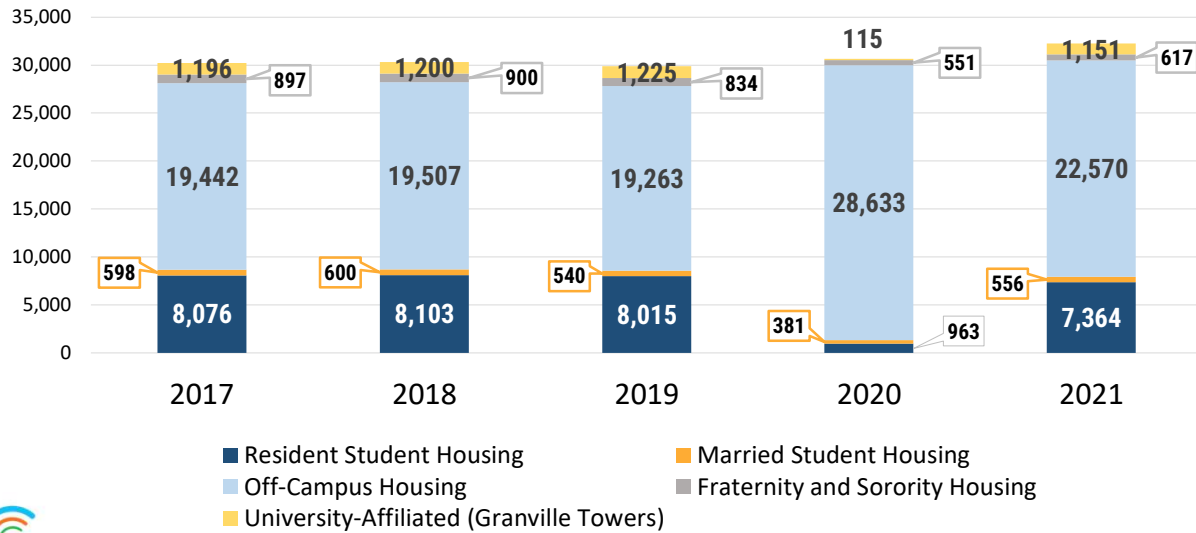


Source: UNC Office of Institutional Research and Analysis

368

Resident Student Housing Rebounds in 2021

UNC-Chapel Hill students by housing type, 2017 to 2021

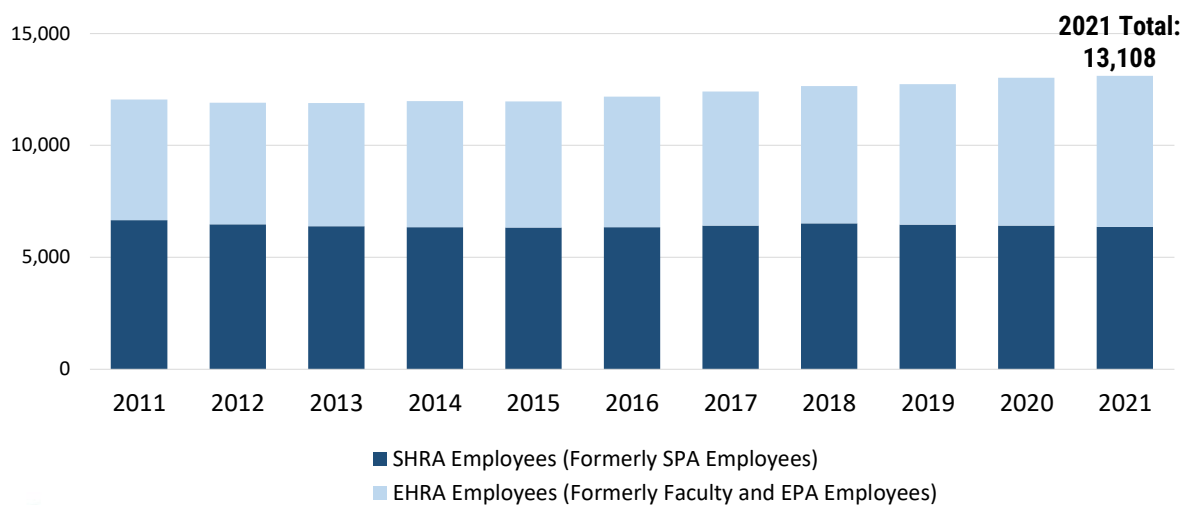


Source: UNC Office of Institutional Research

369

UNC-Chapel Hill Employment Surpasses 13,000

UNC-CH employment by employment classification, 2011 to 2021

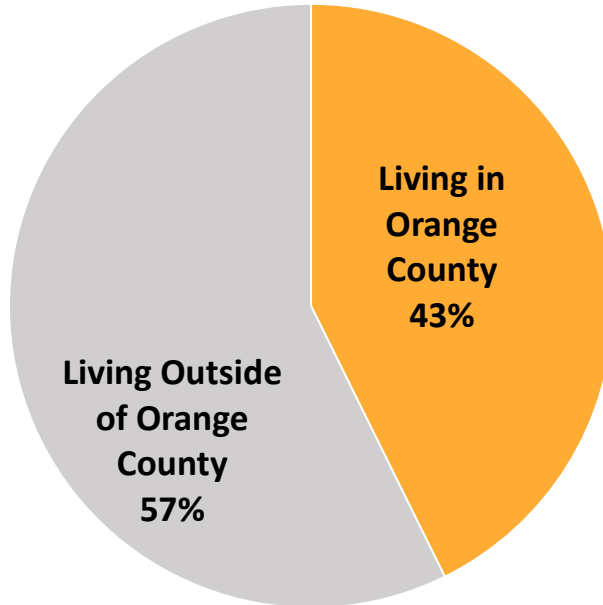


Source: UNC Office of Institutional Research

370

43% of UNC-Chapel Hill Employees Live in Orange County Down from 46% in 2019

Percent of UNC employees living in Orange County, 2022

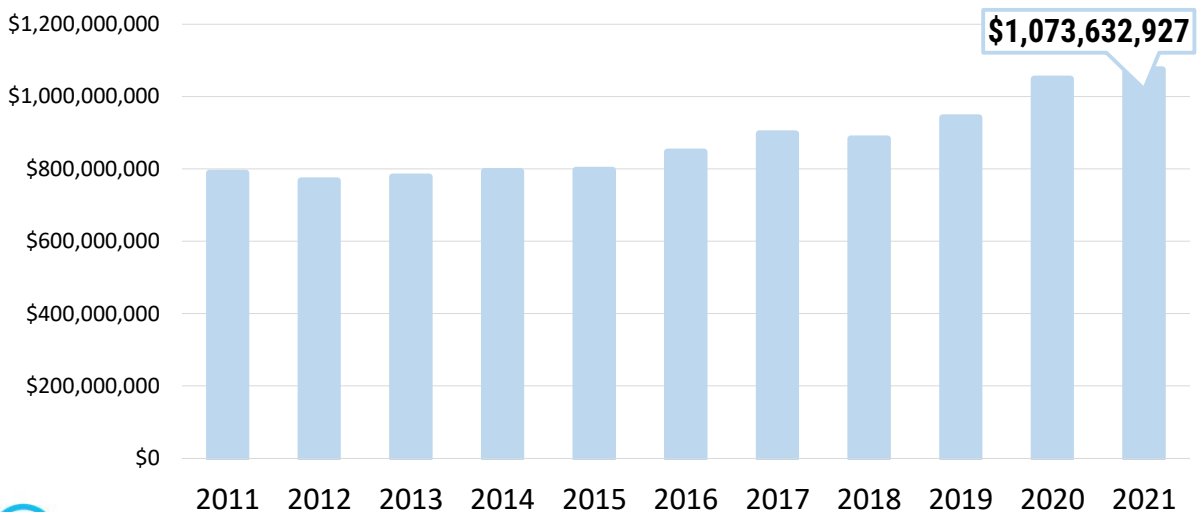


Source: UNC Office of Institutional Research and Analysis

371

UNC-Chapel Hill Research Funding Exceeds \$1 Billion

Research funding, 2011 to 2021

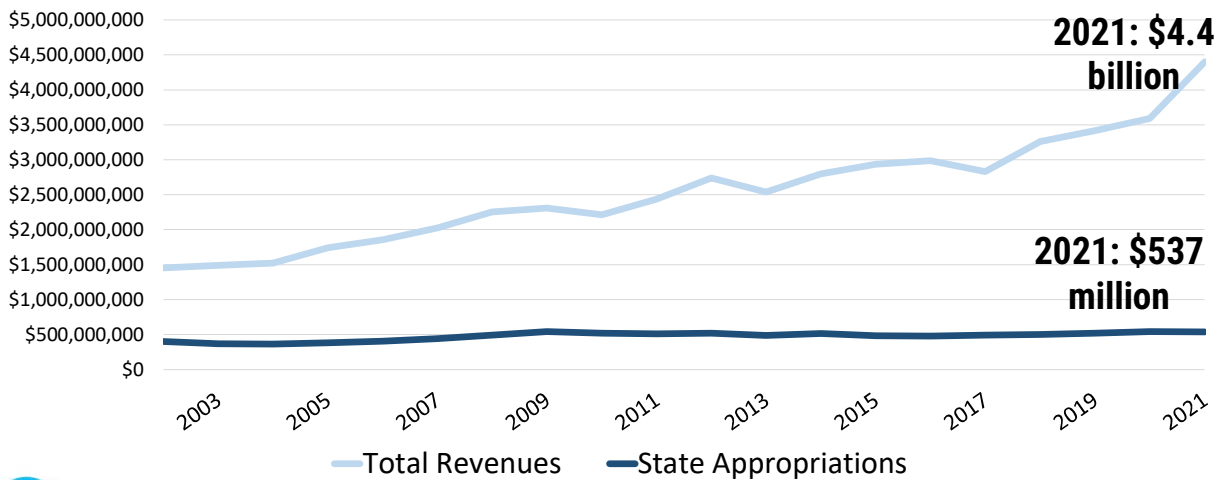


Source: UNC Office of Institutional Research

372

UNC-Chapel Hill Revenues Rise Rapidly, While State Appropriations Remain Flat

Total revenues and state appropriations, 2002 to 2021

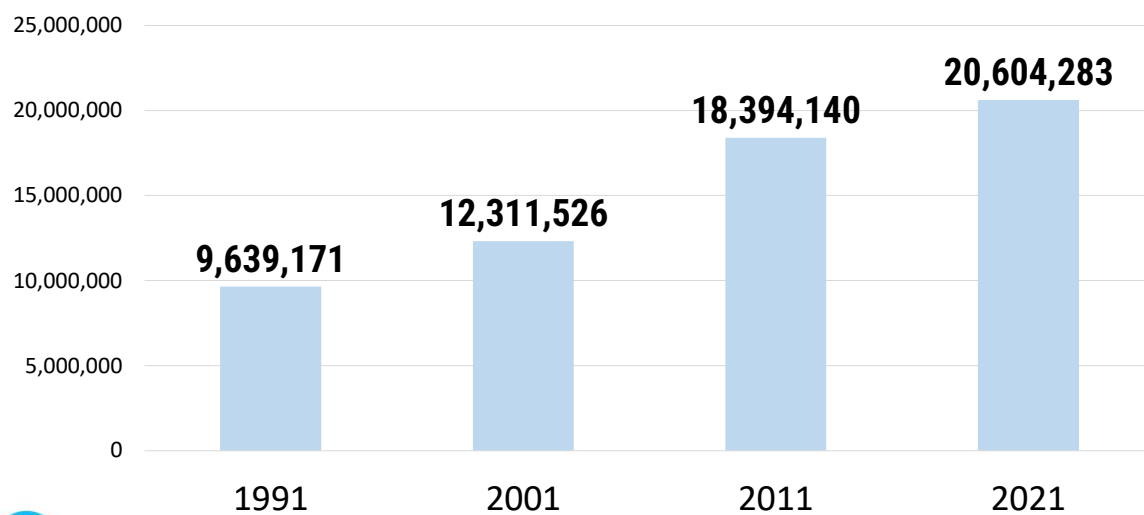


Source: UNC Office of Institutional Research

373

UNC-Chapel Hill Campus Exceeds 20.6 Million Square Feet

UNC Chapel Hill campus facilities 1991, 2001, 2011, 2021

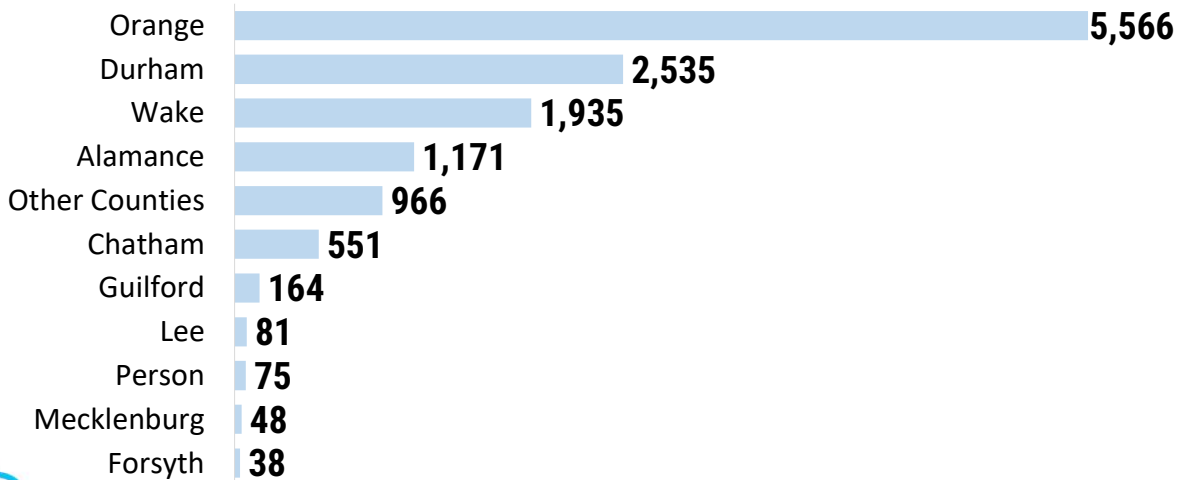


Source: UNC Office of Institutional Research

374

5,566 (43%) of UNC-Chapel Hill Employees Live in Orange County

Distribution of UNC-Chapel Hill's 13,069 employees by county of home address, 2022

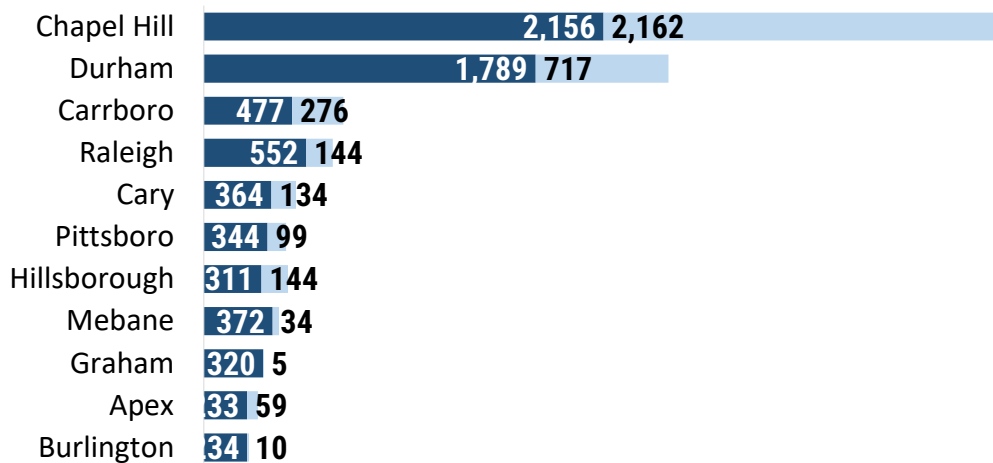


Source: UNC Office of Institutional Research and Analysis

375

Top 11 Cities Where UNC-Chapel Hill Employees Live

Faculty and staff populations by city of home address, 2022



■ Staff (Non Faculty)

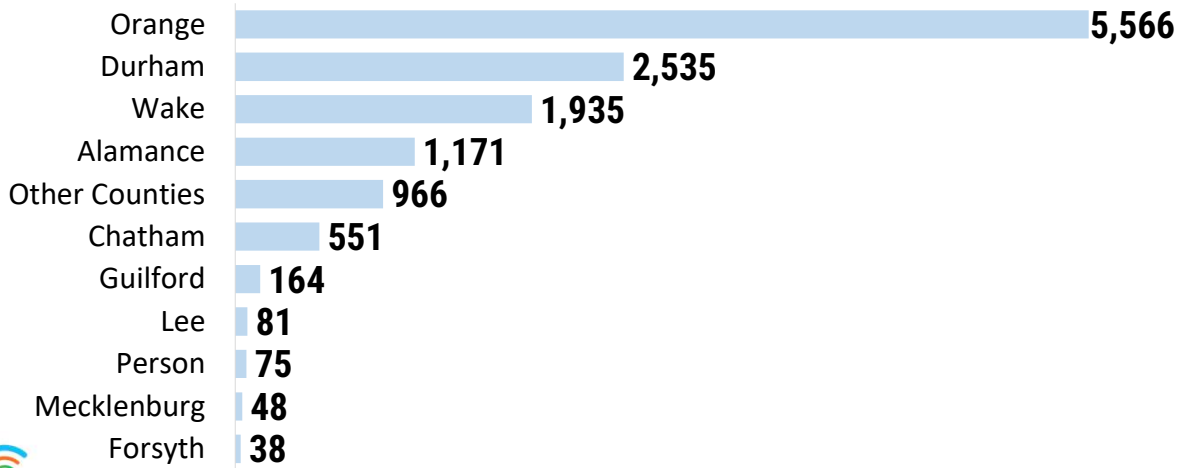
■ Faculty

Source: UNC Office of Institutional Research and Analysis

376

5,566 (43%) of UNC-Chapel Hill Employees Live in Orange County

Distribution of UNC-Chapel Hill's 13,069 employees by county of home address, 2022



Source: UNC Office of Institutional Research and Analysis

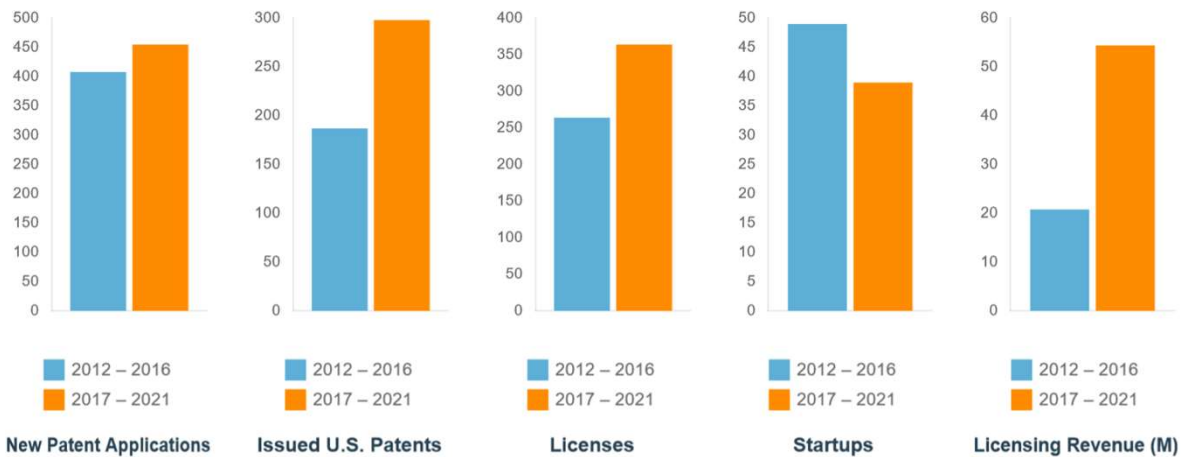
377

UNC Chapel Hill Innovation & Entrepreneurship



378

UNC Patents and Licensing Revenue Show Strong Growth



Source: Innovate Carolina

379

UNC-Chapel Hill Students and Staff Launch 11 Startups and License 64 Technologies in 2021

2021 Figures	Inventions Disclosed	Technologies Licensed	New U.S. Patent Applications	Startups Launched
	149	64	81	11
Cumulative	U.S. Patents Issued	Licensing Revenue	Startups Launched	Startup Investments
	1,003	\$113.4M	146	\$1.5B



Source: Innovate Carolina

380

82% of UNC Chapel Hill Active Startups Headquartered in NC

UNC Chapel Hill Startups Have Big NC Impact



of active UNC startups are headquartered across 30 NC counties



of revenue earned by UNC startups comes from those headquartered in NC



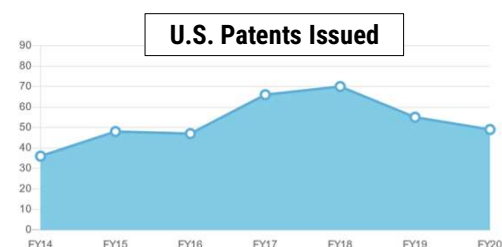
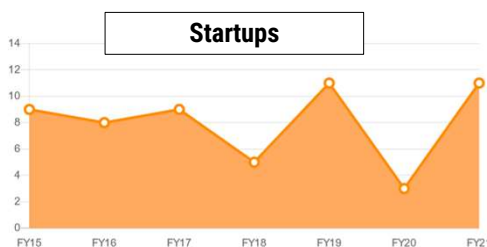
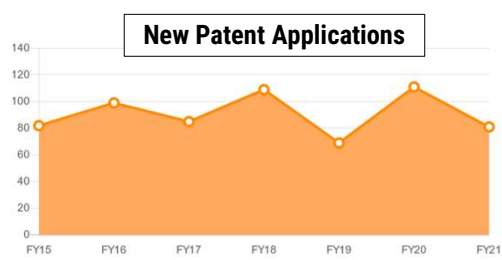
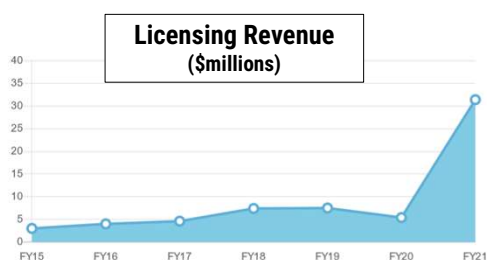
of UNC startups are still active



Source: Innovate Carolina

381

UNC Chapel Hill Innovation and Entrepreneurship



Source: Innovate Carolina

382

UNC Startups Employ 89,818 People Globally



Source: Innovate Carolina

383

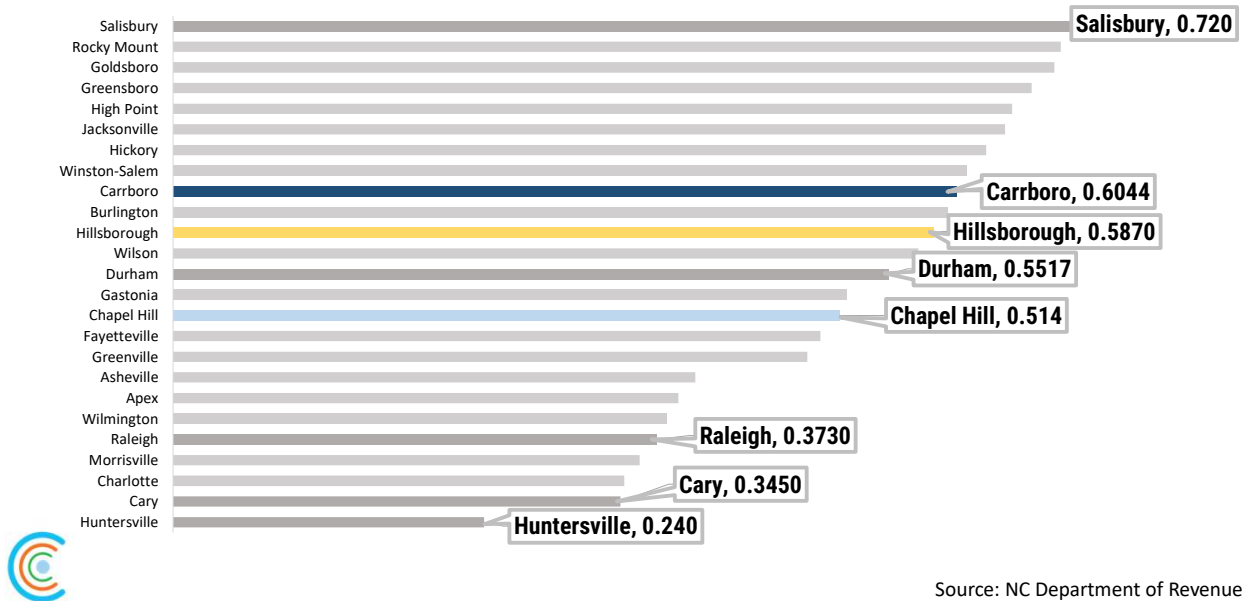
Property Tax & Tax Rates



384

North Carolina Municipal Tax Rates Vary Widely

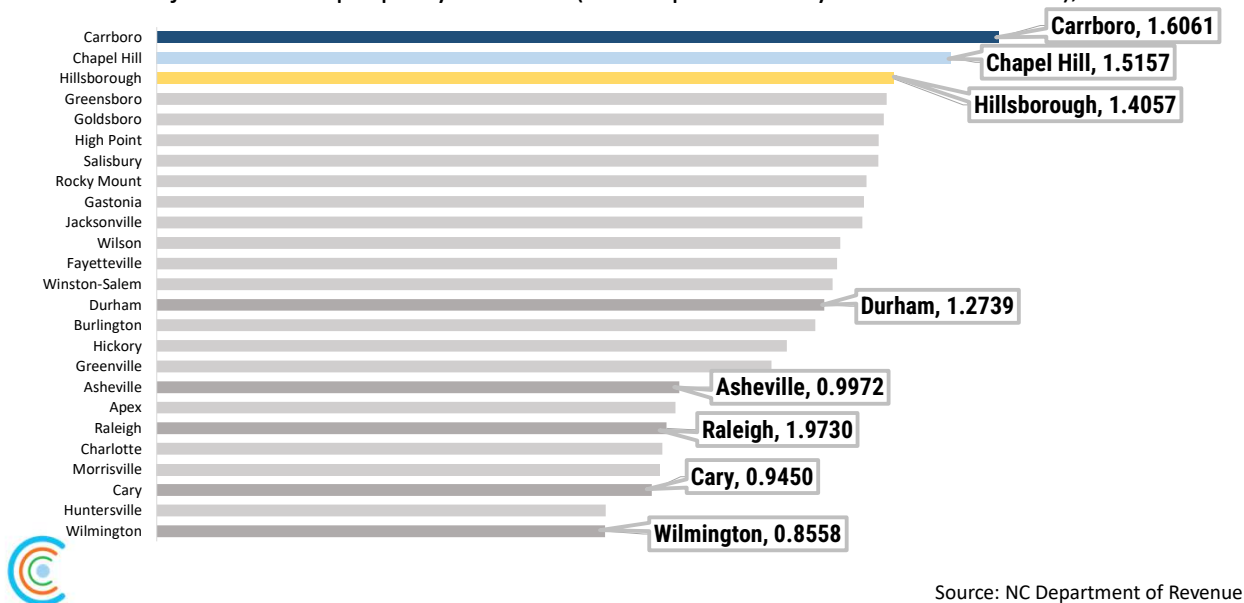
Municipal property tax rates, FY2021-22



385

Local Jurisdictions Have Highest Combined Property Tax Rate

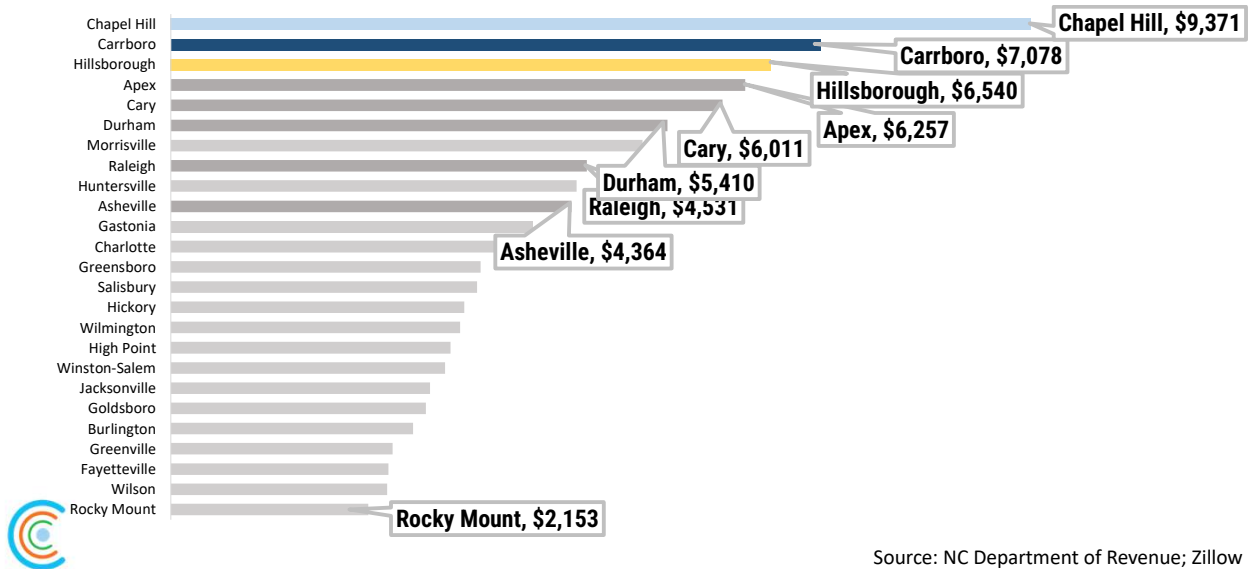
Combined jurisdictions property tax rates (municipal + county + school tax rates), FY2021-22



386

Chapel Hill Has Highest Average Residential Property Tax Bill

Combined local property tax rates (FY 2021-22) assessed on local median home value, June 2022



387

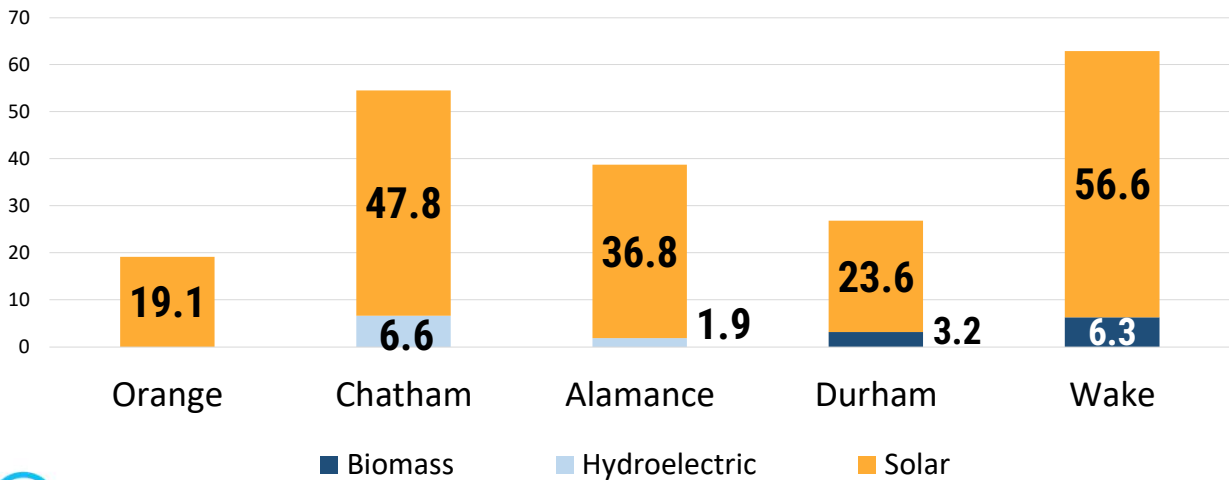
Environment and Natural Resources



388

Orange Co. Lags in Renewable Energy Production Capacity

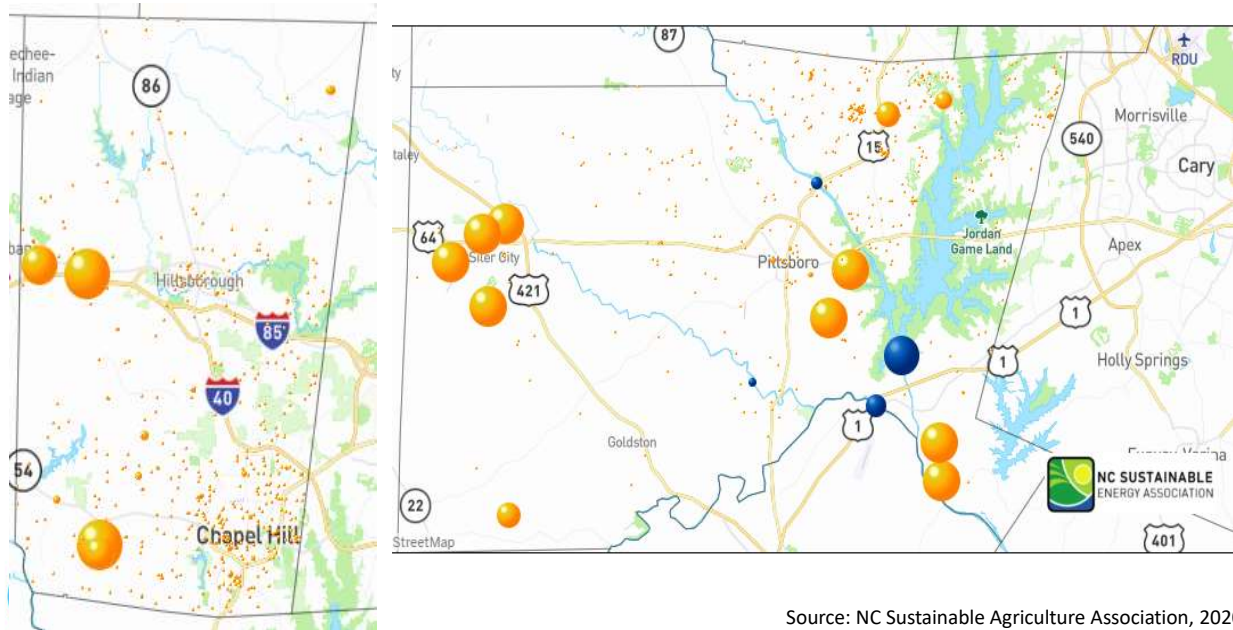
County renewable energy production capacity (megawatts)



Source: NC Sustainable Agriculture Association, 2020

389

Orange and Chatham Solar Installations



Source: NC Sustainable Agriculture Association, 2020

390

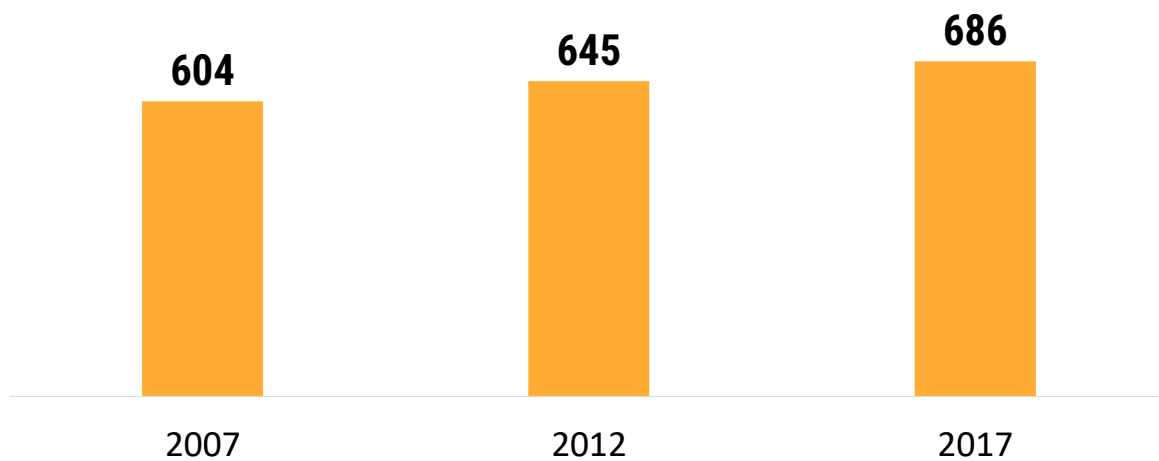
Farming



391

Number of Orange County Farms Is Increasing

USDA Census of Agriculture: Total number of farms in Orange County

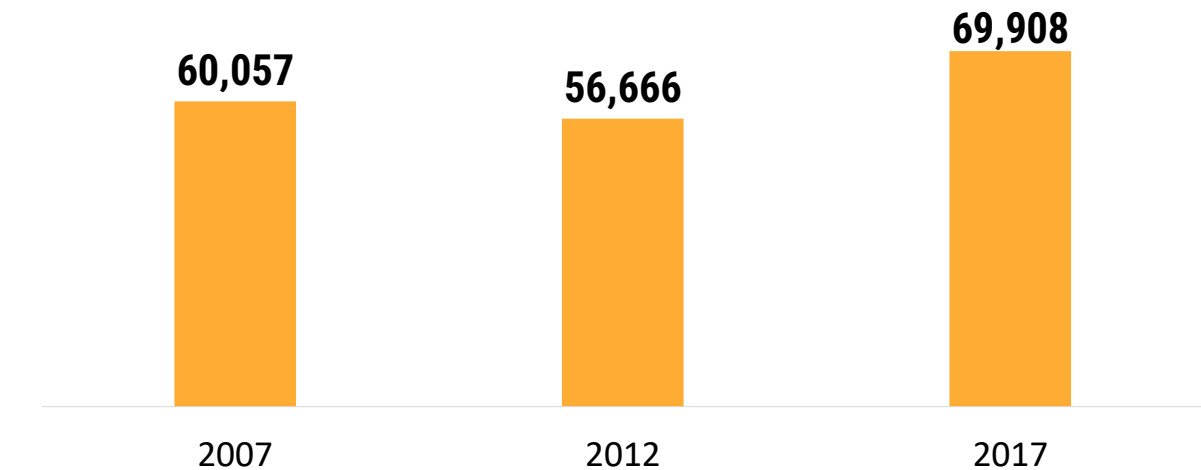


Source: US Department of Agriculture

392

Orange County Land in Farms (acres) in Increasing

USDA Agricultural Census: Total acres of farm in Orange County

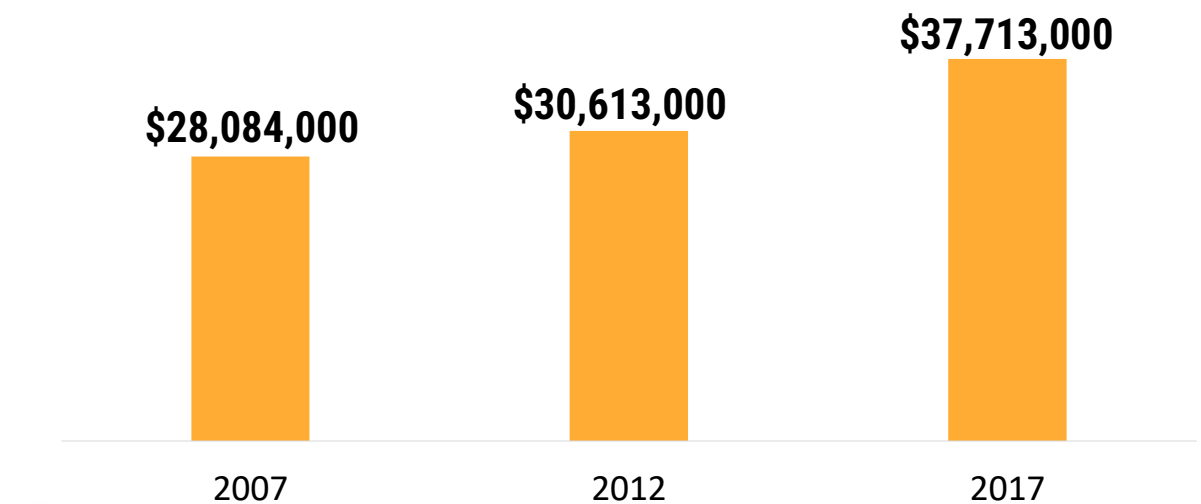


Source: US Department of Agriculture

393

Value of Orange County Farm Product Sales Growing

USDA Agricultural Census: Market value of Orange County products sold

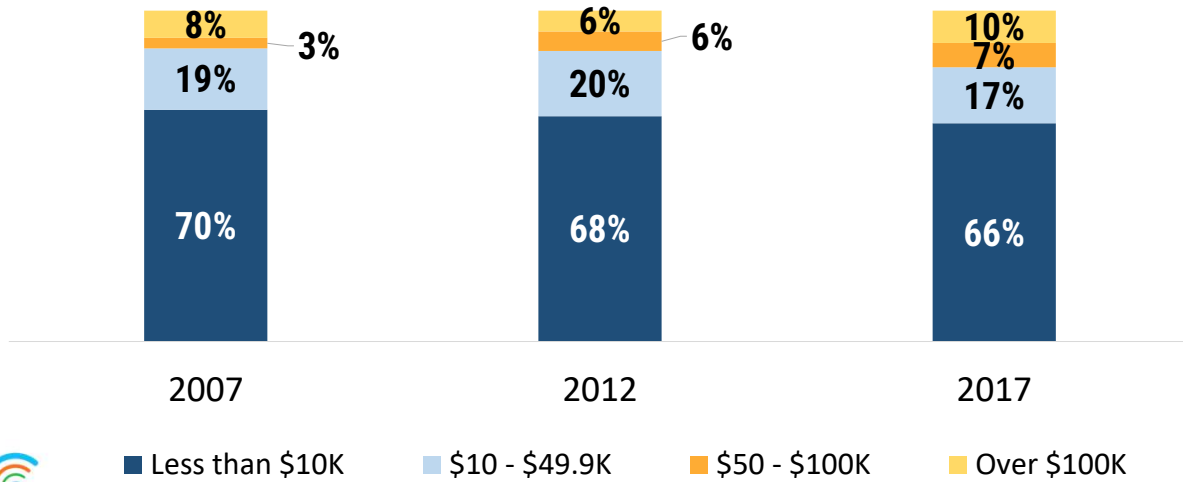


Source: US Department of Agriculture

394

Majority of Orange County Farms Have Less Than \$10,000 in Annual Sales

Orange County farms by value of sales



Source: US Department of Agriculture

395

Waste, Recycling, and Emissions



396

County Recycling Program Performance

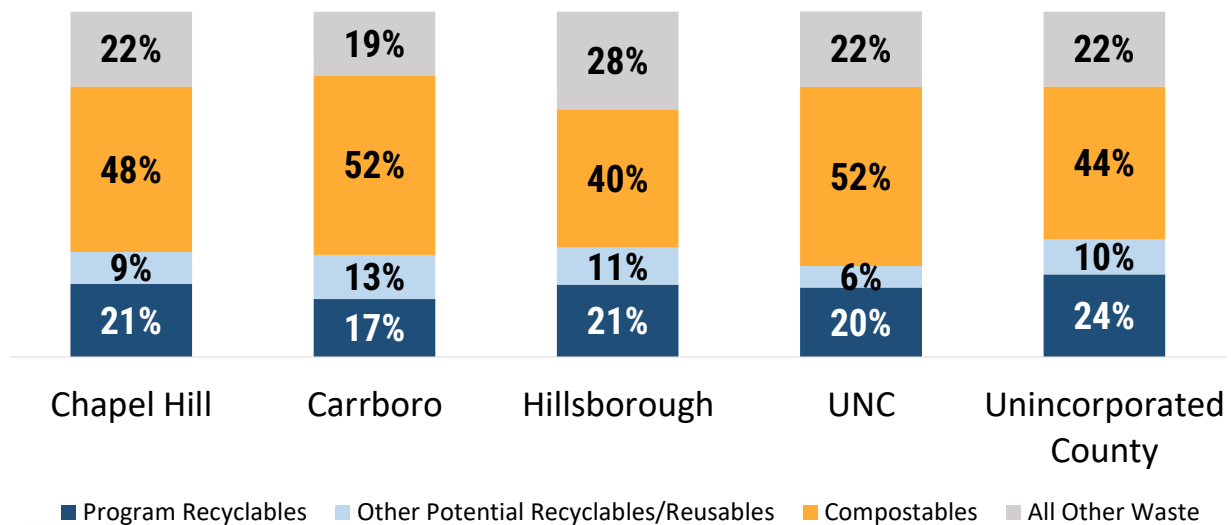
Top 5 Public Recycling Per Capita	Top 5 Household Recyclables Per Capita Recovery
Iredell County (1)	Catawba County (1)
Catawba County (2)	Dare County (2)
Pitt County (3)	Orange County (3)
Orange County (4)	Pitt County (4)
Macon County (5)	Currituck County (5)
Chatham County (50)	Chatham County (47)



Source: NC Division of Environmental Assistance and Customer Service 2017 (DEACS)

397

Waste Composition by Jurisdiction

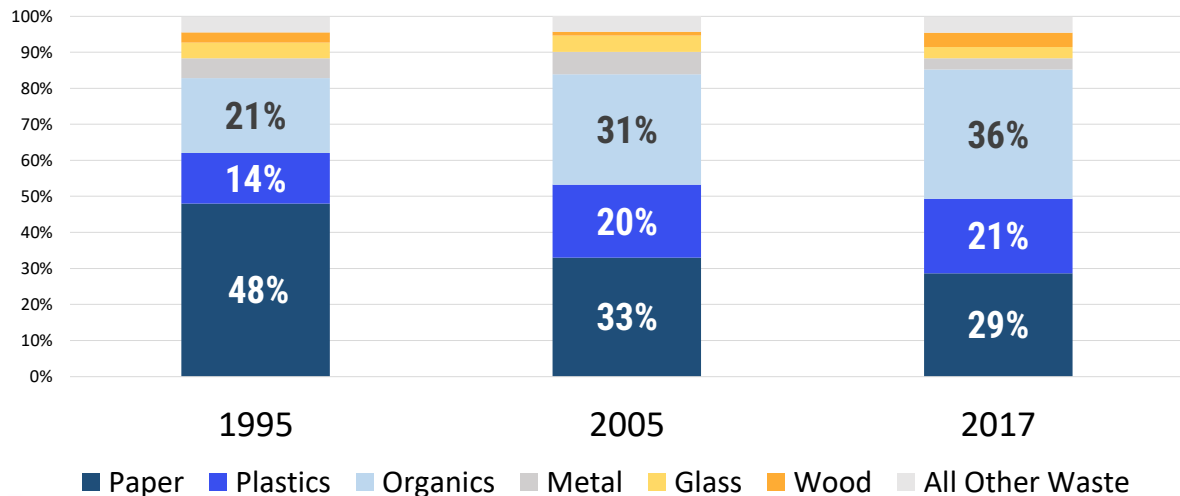


Source: Orange County Government, 2017

398

Paper is Down and Organics Up in Commercial Waste Stream

Orange County commercial waste compositions (1995, 2005, and 2017)

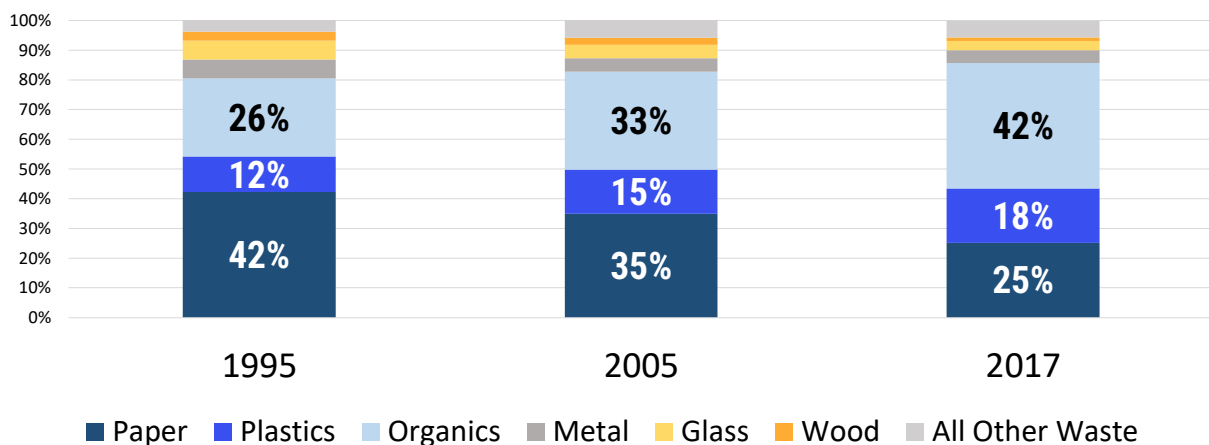


Source: Orange County Government, 2017

399

Paper Down and Plastics Up in Single Family Residential Waste

Orange County single family residential waste composition over time (1995, 2005, and 2017)

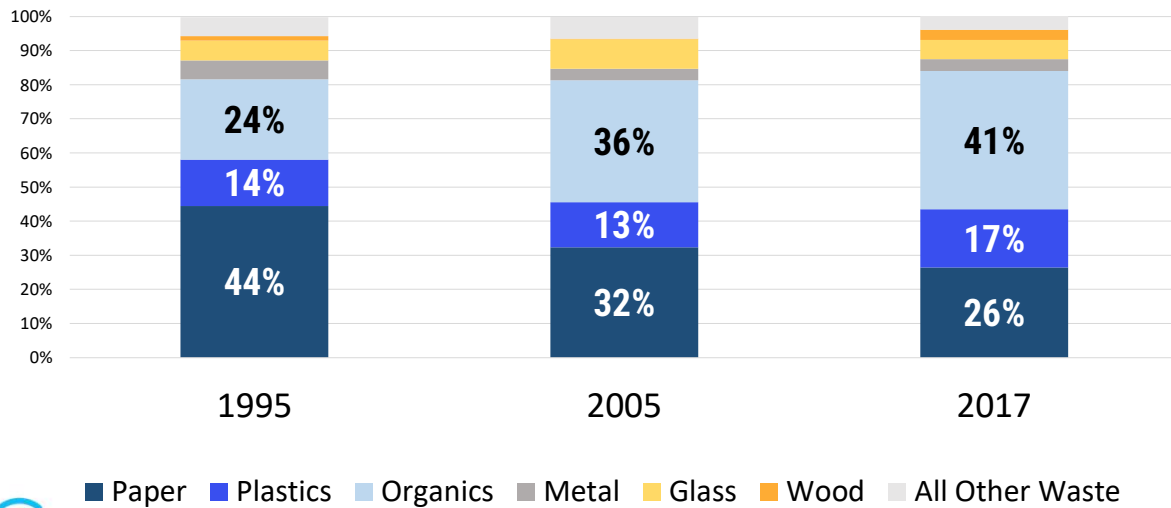


Source: Orange County Government, 2017

400

Organics Up; Paper Way Down in Multi-Family Waste

Orange County multi family waste compositions over time (1995, 2005, and 2017)

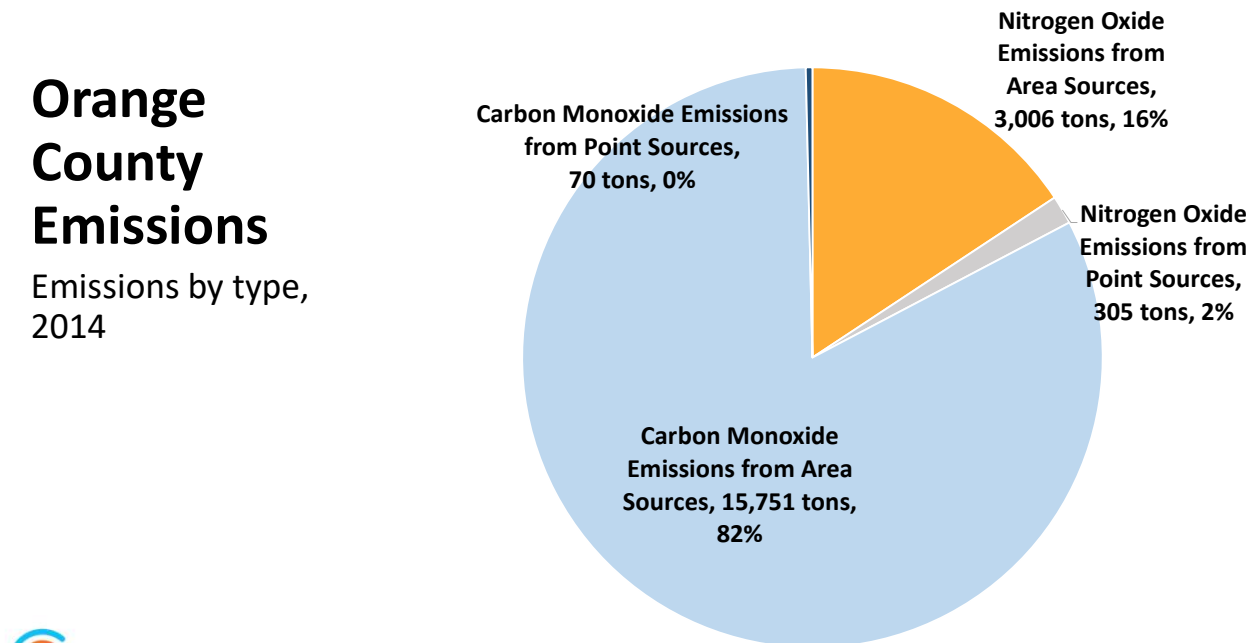


Source: Orange County Government, 2017

401

Orange County Emissions

Emissions by type, 2014

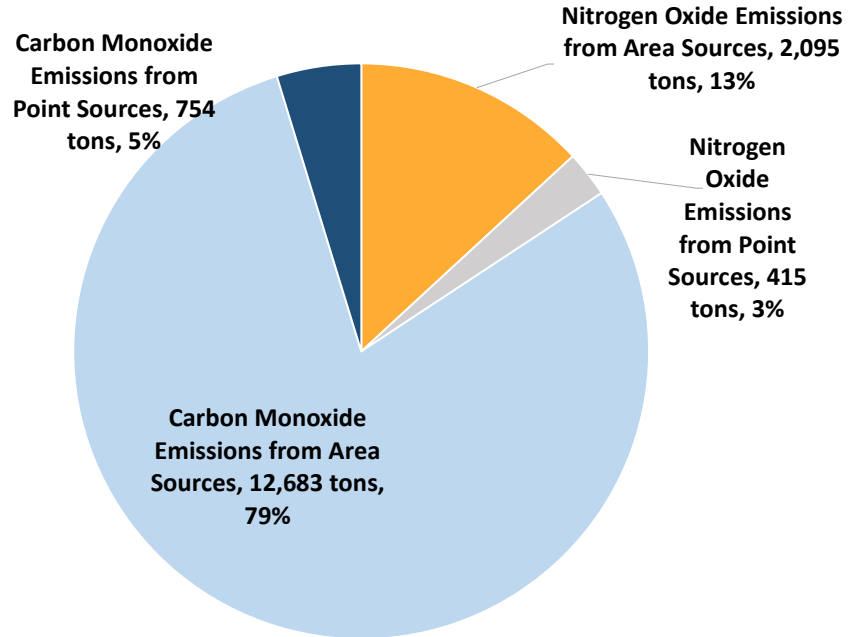


Source: NC Department of Environmental Quality, EPA

402

Chatham County Emissions

Emissions by type, 2014



Source: NC Department of Environmental Air Quality, EPA



403

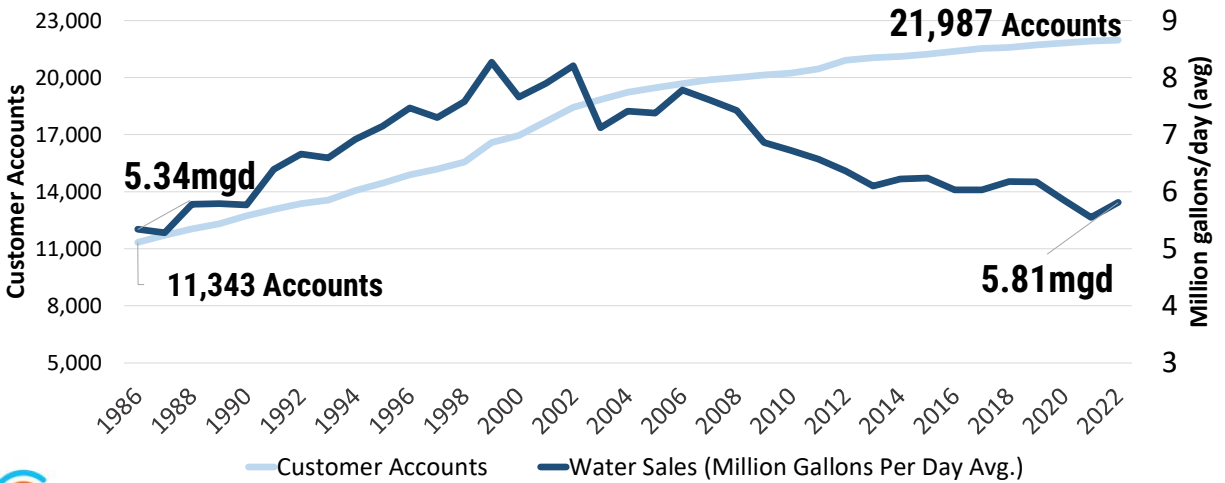
Water



404

OWASA Accounts Grow by 10,000, But Daily Water Use Nearly the Same as 1986

Annual customer account totals and daily usage totals 1986-2022

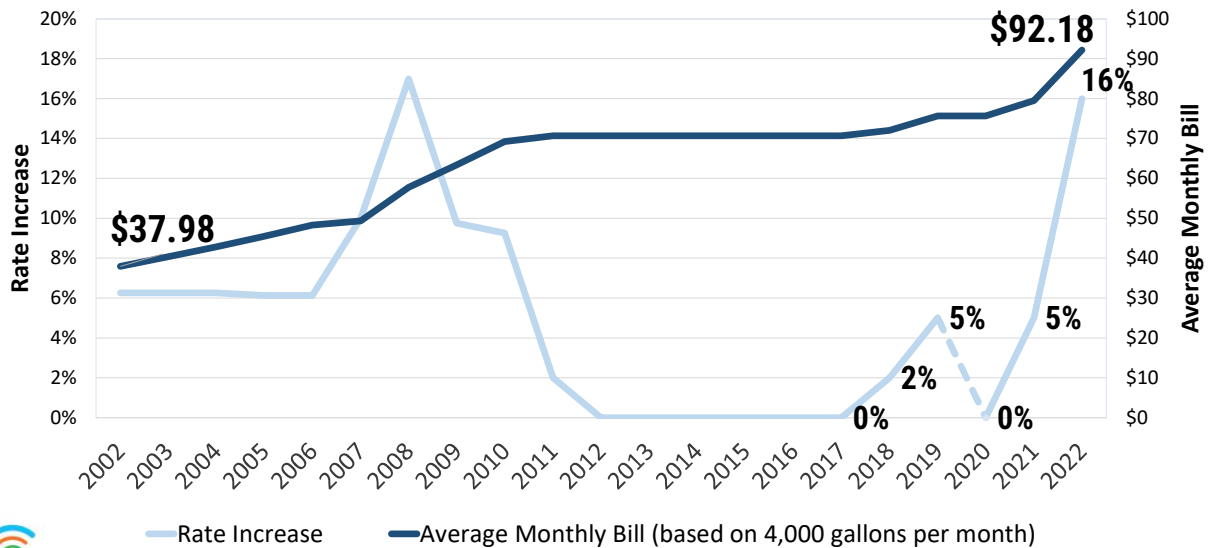


Source: OWASA

405

OWASA Rates up 21% since 2020

OWASA annual rate increases and average customer bill, 2002-2022



Source: OWASA

406

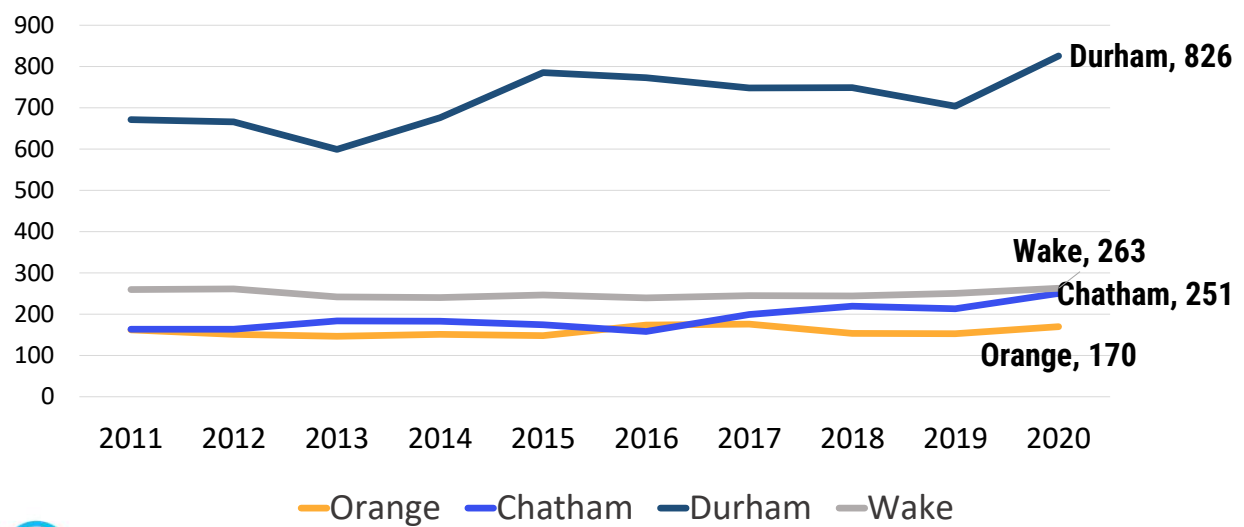
Crime



407

Violent Crime Rises Slightly

Violent crimes per 100,000 residents (2011 to 2020)

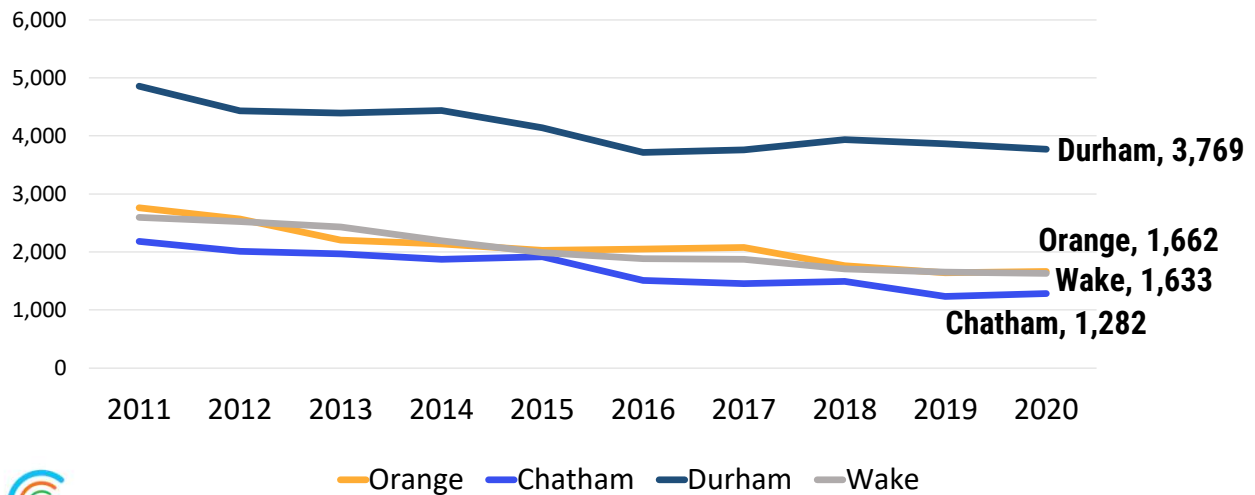


Source: NC State Bureau of Investigation

408

Property Crime Down Across the Triangle; Chatham Has Lowest Rates

Property crimes per 100,000 residents (2011 to 2020)

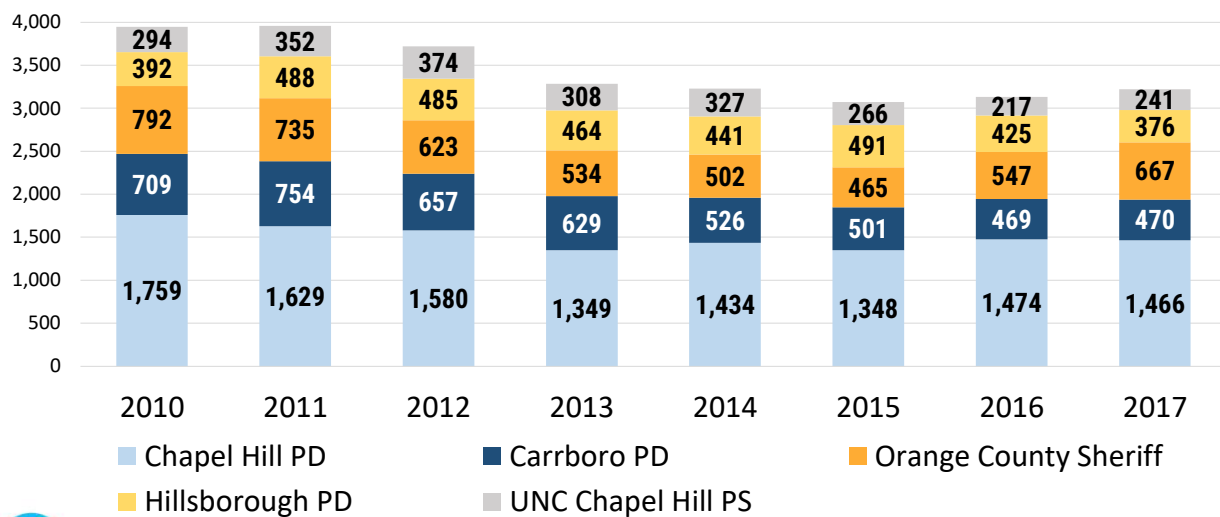


Source: NC State Bureau of Investigation

409

Total Incidents by Department

(Murder, rape, robbery, aggravated assault, burglary, larceny, and motor vehicle theft)

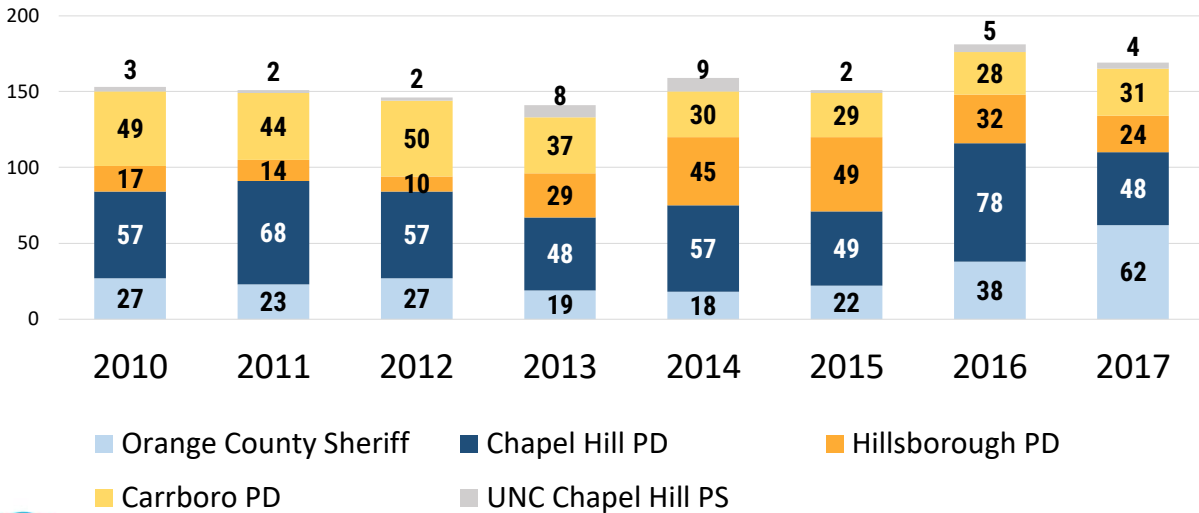


Source: NC State Bureau of Investigation

410

Incidents Against People by Department

(Murder, rape, and aggravated assault)

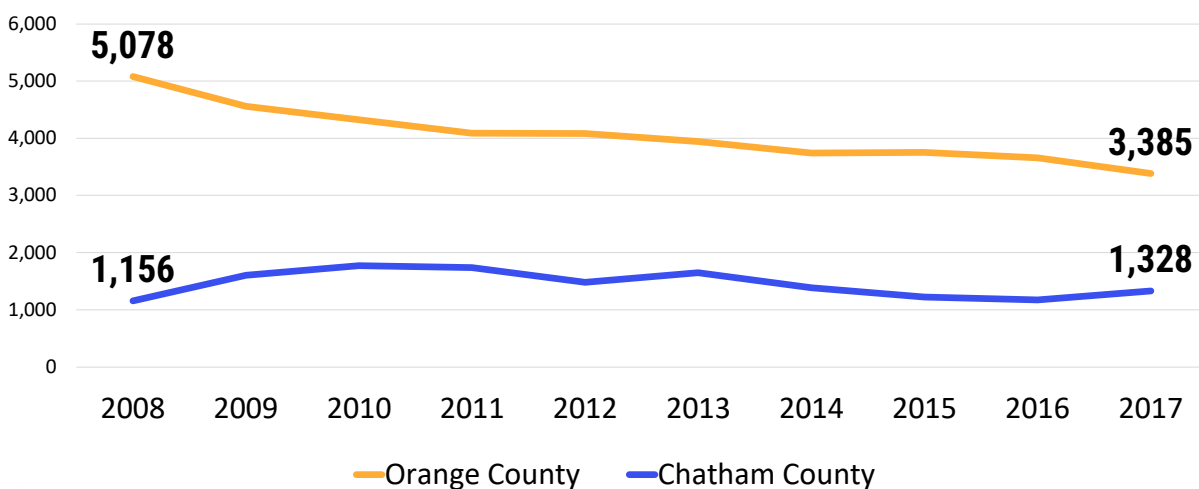


Source: NC State Bureau of Investigation

411

Total Arrests in Orange and Chatham Counties

Total arrests by county for the decade, 2008 to 2017

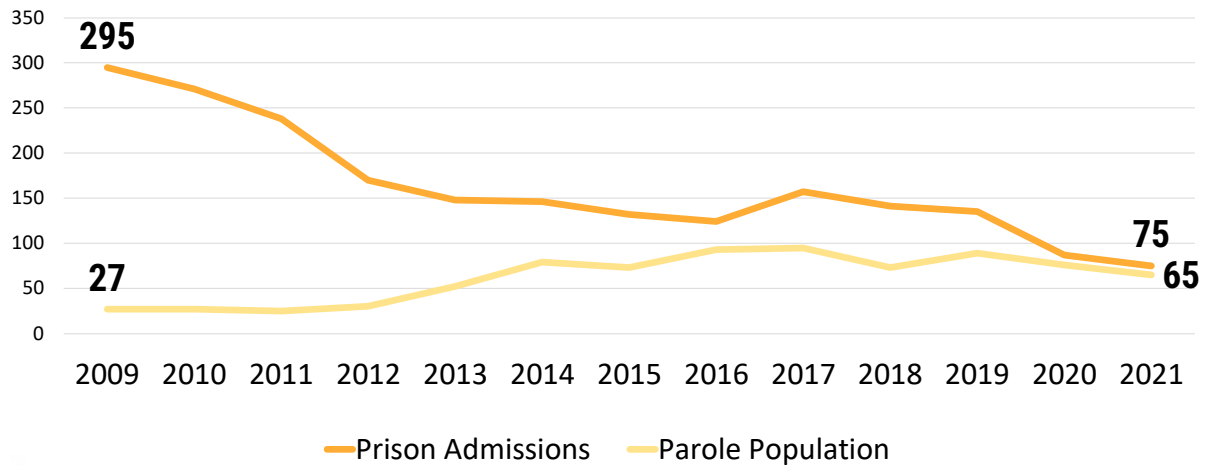


Source: NC Department of Public Safety, North Carolina Judicial Branch

412

Orange Prison Admissions Down and Parole Populations Up

Orange County prison admissions and parole populations 2009 to 2021

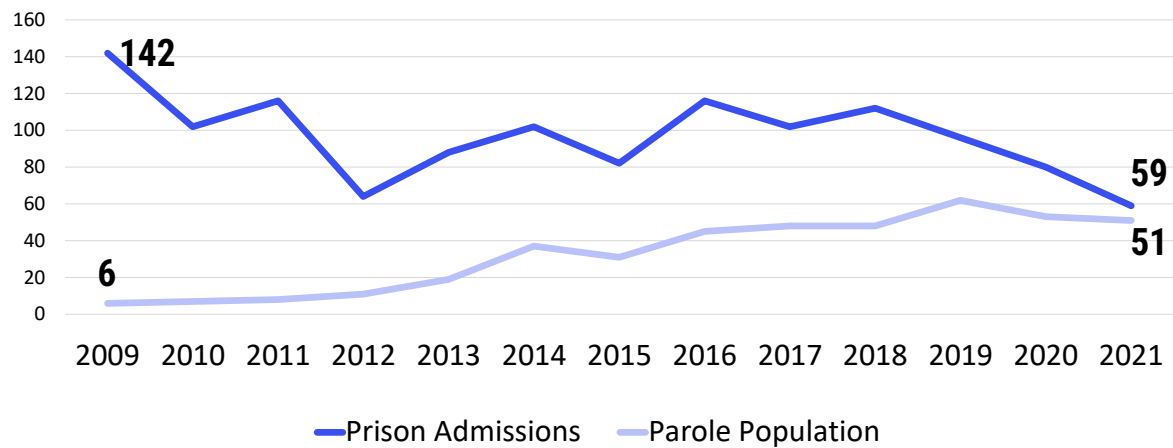


Source: NC Department of Public Safety, North Carolina Judicial Branch

413

Chatham Prison Admissions Down and Parole Population Up

Chatham County prison admissions and parole population, 2009 to 2021



Source: NC Department of Public Safety, North Carolina Judicial Branch

414

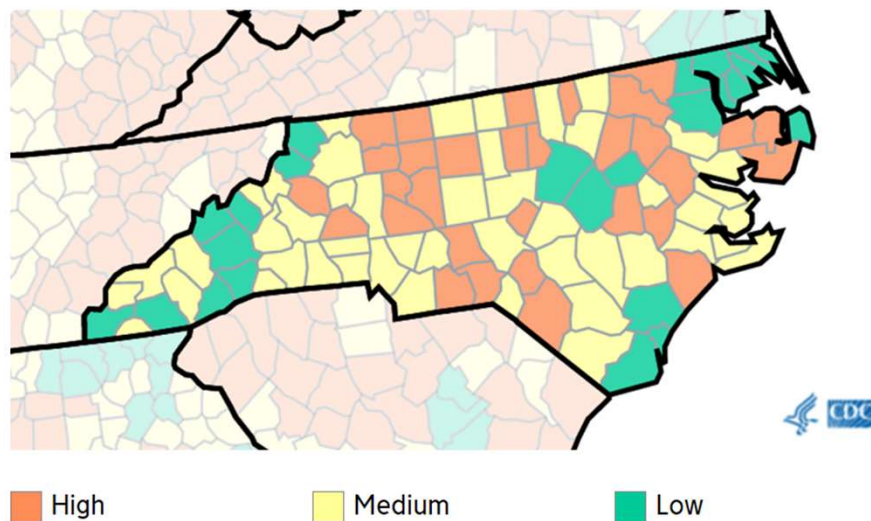
Covid-19



415

CDC: Counties with High Risk of Illness and Strain on the Healthcare System

August 2022

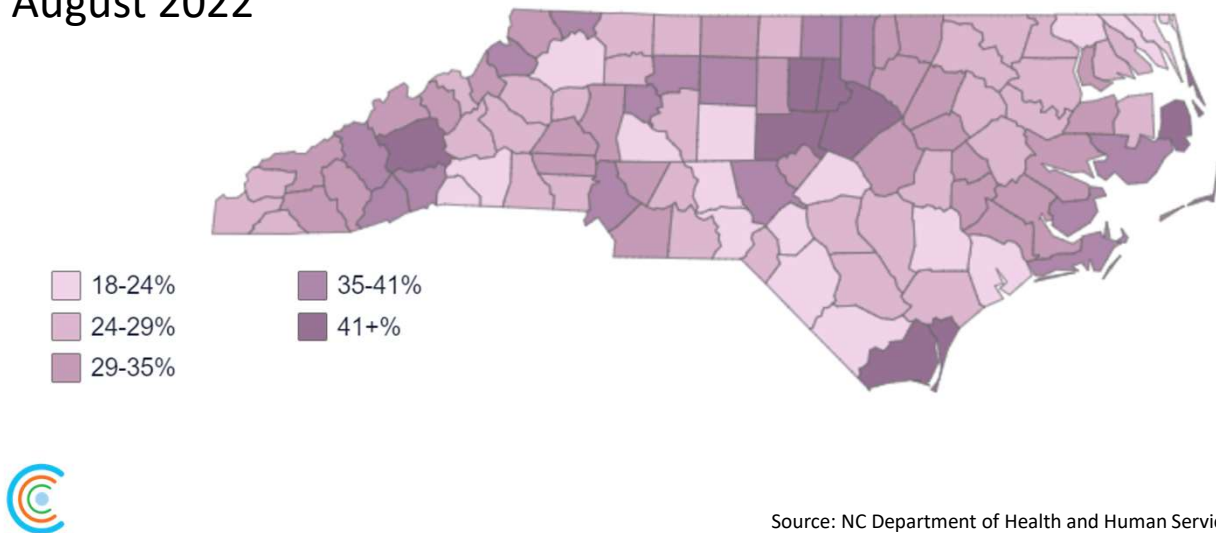


Source: NC Dept of Health and Human Services

416

Percent of Total Population with at Least One Booster or Additional Dose

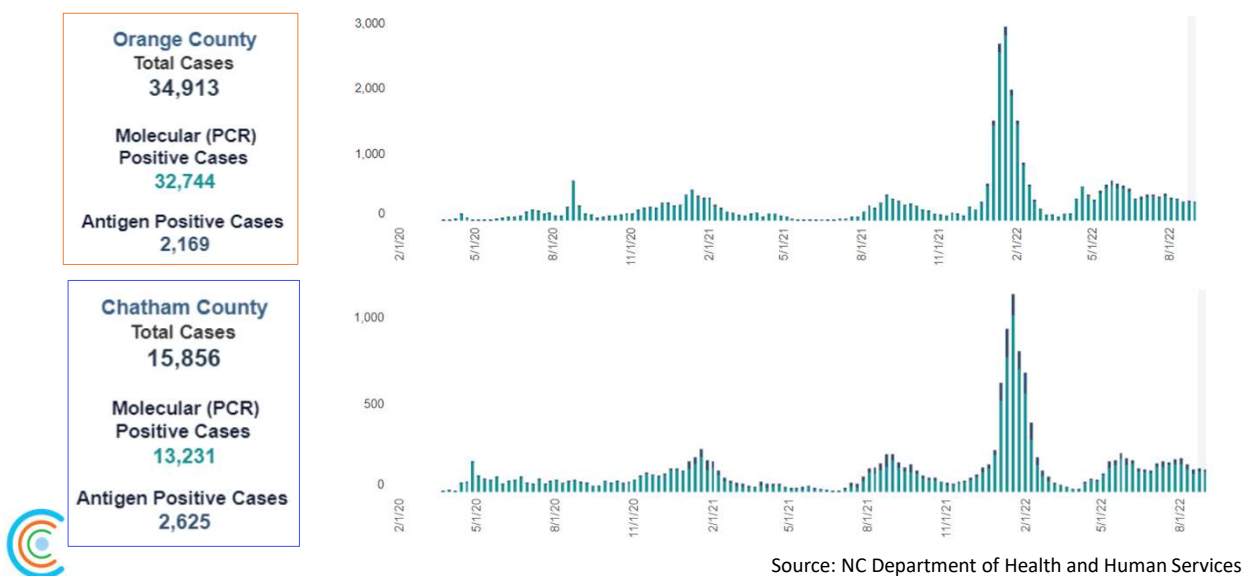
August 2022



417

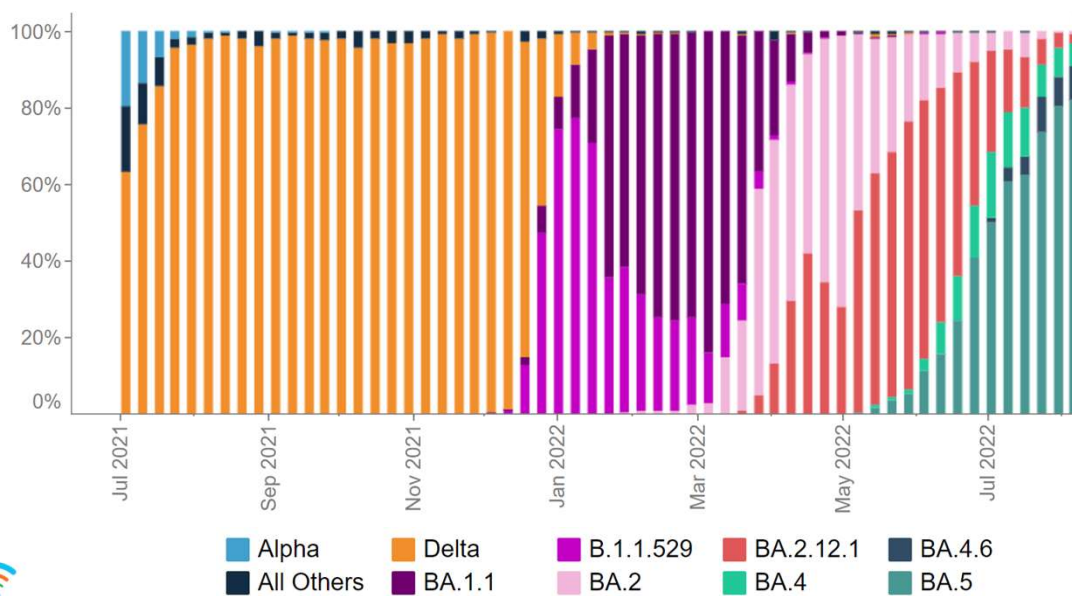
Orange and Chatham Weekly Covid-19 Cases

February 1, 2020 through August 20, 2022



418

Covid-19 Variants Being Detected in North Carolina

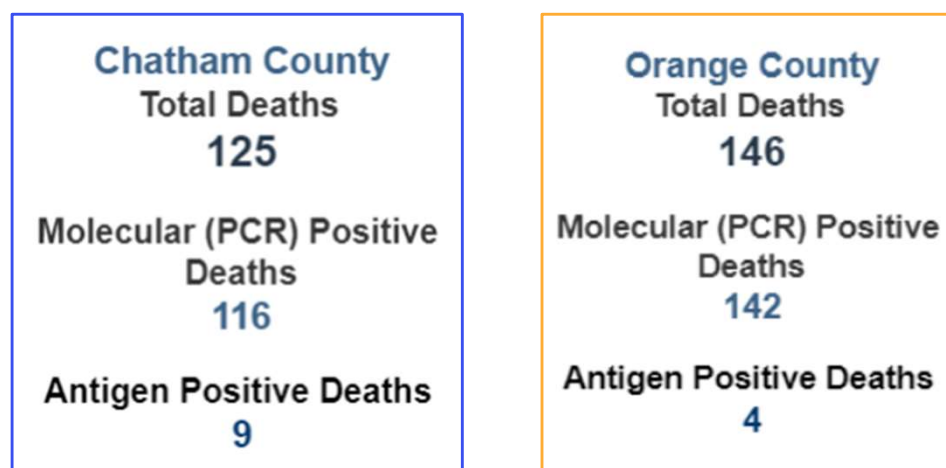


Source: NC Department of Health and Human Services

419

Orange and Chatham Covid-19 Deaths

February 1, 2020 through August 20, 2022



NC Department of Health and Human Services

420